

Petitioner Barbra Renee Aguilar (Pro Per)

Petition for Specified Visitation

BARBRA RENEE AGUILAR, non-relative Co-Guardian, is Petitioner.

~Please see Petition for details~

Cont. from

	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
✓	Notice of Hrg	
✓	Aff.Mail	W
	Aff.Pub.	
	Sp.Ntc.	
✓	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	X
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

NEEDS/PROBLEMS/COMMENTS:

Notes Re Notice:

- Notice of Hearing filed 12/29/2015 and 12/14/2015 contain an incorrect case number in the caption, thus notice may have been defective as to the case number at the time the notice documents were served.
- Proof of Personal Service filed 12/29/2015 indicates that the person effecting service, **TAD STROM**, served Co-Guardian **SHANNON AGUILAR'S** wife on 12/13/2015, after several attempts at personal service on Mr. Aguilar, and that his wife refused to give her name and refused to ask Shannon Aguilar to the door, stating he was home but busy, and that her name is Mrs. Aguilar.

Reviewed by: LEG

Reviewed on: 1/22/16

Updates:

Recommendation:

File 1- Aguilar

First and Final Account and Report of Administrator and Petition for Its Settlement, for Allowance of Compensation to Administrator and Attorneys for Ordinary and Extraordinary Services, for Reimbursement of Costs Advanced, and for Final Distribution

DOD: 09/05/06	ELIZABETH FELIX , Administrator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need Allowance or Rejection of Creditor's Claim for the two claims filed by the Department of Health Care Services.
	Account period: 09/09/06 – 11/23/15	
Cont. from	Accounting: \$160,000.00	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH: \$160,000.00	
<input checked="" type="checkbox"/> Verified	Ending POH: \$30,381.82	
<input checked="" type="checkbox"/> Inventory	Administrator: \$1,452.08 (statutory)	
<input checked="" type="checkbox"/> PTC	Attorney: \$1,452.08 (statutory)	
<input checked="" type="checkbox"/> Not.Cred.	Attorney x/o: \$2,170.00 (itemized by date for sale of real property, claiming excess proceeds from Fresno County Tax Collector)	
<input checked="" type="checkbox"/> Notice of Hrg	Costs: \$1,643.00 (recording fees, appraisal fee, filing fees, certified copies, publication, probate referee)	
<input checked="" type="checkbox"/> Aff.Mail w/	Petitioner states that the estate is insolvent. The remaining cash on hand, after payment of expenses of administration will be paid as follows:	
Aff.Pub.	Dept. of Health Care Services - \$459.78 as payment in full for their claim filed 05/09/07	
Sp.Ntc.	Dept. Health Care Services - \$23,204.88 as partial payment for their claim filed 05/09/07. Additionally the first \$46,162.67 of any after discovered property to be paid until the claim is paid in full	
Pers.Serv.		
Conf. Screen		
Letters 03/21/07		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice n/a		
		Reviewed by: JF
		Reviewed on: 01/22/16
		Updates:
		Recommendation:
		File 2- Estrada

First and Final Report of Executor of Status of Administration; Waiver of Accounting; and Petition for Allowance of Statutory Attorneys' Compensation; and for Final Distribution

DOD: 10/17/08	LAWRENCE HARTWIG , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. The Petitioner states that a Waiver of Accounting has been filed by Danielle Hartwig, however, no such Waiver has been filed. 2. The Order is missing pages 5-6. Need revised order. 3. The proposed distribution includes the entirety of cash remaining in the estate and does not make a provision for payment of the statutory attorney's fees. Are the fees to be paid outside of the estate? 4. Need Notice of Hearing and proof of service by mail of the Notice of Hearing on all interested parties/beneficiaries.
	Accounting is waived.	
Cont. from	I & A - \$569,735.87	
Aff.Sub.Wit.	POH - \$491,030.39	
✓ Verified	(\$63,530.39 is cash)	
✓ Inventory	Executor - waived	
✓ PTC	Attorney - \$14,394.72	
✓ Not.Cred.	(statutory)	
Notice of Hrg	x	
Aff.Mail	x	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters	03/23/11	
Duties/Supp		
Objections		
Video Receipt		
CI Report		
✓ 9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
✓ FTB Notice		
	Distribution, pursuant to Decedent's will, is to:	
	Lawrence D. Hartwig: tangible personal property valued at \$7,500.00	
	Lawrence D. Hartwig, as Trustee of the Delores Edith Hartwig Bypass Trust: \$63,530.39 cash, plus decedent's interest in 2 parcels of real property in Fresno County	
	Daniel Hartwig, Danielle Hartwig and David Hartwig: Specific bequests of jewelry as specified in decedent's will, if said jewelry is discovered	
	Lawrence D. Hartwig, Daniel Hartwig, Danielle Hartwig and David Hartwig: The remainder of decedents jewelry not otherwise specifically devised, if any jewelry is discovered	
Reviewed by: JF		
Reviewed on: 01/22/16		
Updates:		
Recommendation:		
File 3- Hartwig		

Petition for Settlement on Waiver of Account; Petition for Final Distribution and for Allowance of Compensation for Ordinary Services

DOD: 11/16/10	ERNEST MEGAZZINI , Son and Administrator with Limited IAEA without bond, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need receipt for payment of the Creditor's Claim in the amount of \$819.27 filed by the Franchise Tax Board or satisfaction/withdrawal from FTB.</p>
	Accounting is waived	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.	I&A: \$155,000.00	
<input checked="" type="checkbox"/> Verified	POH: \$155,000.00 (real property in Fresno, CA and Lancaster, CA)	
<input checked="" type="checkbox"/> Inventory		
<input checked="" type="checkbox"/> PTC	Administrator (Statutory): Waived	
<input checked="" type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Attorney (Statutory): \$5,650.00 (to be paid outside of probate)	
<input checked="" type="checkbox"/> Aff.Mail		
Aff.Pub.	Distribution pursuant to intestate succession and assignment of interest filed 12/1/15:	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Ernest Megazzini: A 100% interest in the real property in Fresno and an undivided one-half interest as tenant in common in the Lancaster real property	
<input checked="" type="checkbox"/> Letters		
Duties/Supp		
Objections	Donna Ewert: An undivided one-half interest as tenant in common in the Lancaster real property	
Video Receipt		
CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
<input checked="" type="checkbox"/> FTB Notice		
		Reviewed by: skc
		Reviewed on: 1/22/16
		Updates:
		Recommendation:
		File 4- Megazzini

Petition for Approval of Trustee's Second Account Current, for Approval of Trustee's Fees, and for Authorization to Pay Fees and Costs of Counsel for the Trustee

		PERINE & DICKEN , Trustee, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 1/12/16. Minute order states the Court indicates that it is inclined to approve a maximum for the time it takes to make a round-trip to visit the beneficiary, and whatever time is spent at the residence at \$125.00 per hour. After argument with Counsel, the Court further indicates that it is willing to consider additional suggestions in order to meet-in-the-middle on the issue. Mr. Barron is to file any additional information at least three court days prior to 1/26/16. All other items in the account would be approved.</p>
		Account period: 7/1/2014 – 6/30/2015	
		Accounting - \$605,519.45	
		Beginning POH - \$555,101.64	
		Ending POH - \$563,782.90 (\$49,397.83 is cash)	
Cont. from 011216			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Trustee - \$5,743.75 (paid) <i>(itemized at Exhibit D; for 45.95 hours @ \$125.00 per hour; Order Establishing SNT filed 7/22/2013 authorizes Trustee fees of up to maximum of \$1,500.00 per month subject to Court approval;)</i>	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W/	
<input type="checkbox"/>	Aff.Pub.	Attorney - \$3,249.00 <i>(itemized at Exhibit C; for 8.10 hours @ \$250.00 attorney rates per hour and 13.60 hours @ \$90.00 paralegal and bookkeeper rates per hour;)</i>	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters	Costs - \$331.00 <i>(filing fee, runner service and court call)</i>	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections	Bond - \$646,000.00 <i>(Petitioner requests reduced bond of \$643,000.00;)</i>	
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
Please see additional page			
		Reviewed by: KT	
		Reviewed on: 1/21/16	
		Updates:	
		Recommendation:	
		File 5- Davis-Maynard	

5 Jayden Davis-Maynard Special Needs Trust Case No. 13CEPR00416

Petitioner prays for an Order:

1. Approving, allowing and settling the Second Account and Report of the Trustee;
2. Approving as just and reasonable the Trustees' fees charged to the SNT from 7/1/2014 to 6/30/2015;
3. Authorizing payment of the Attorney fees and costs;
4. Authorizing bond be reduced to **\$643,000.00**;

(1) Waiver of First and Final Account and Report of Administrator and Petition for Settlement Thereof; (2) for Waiver of Administrator's Compensation for Ordinary Services; (3) for Allowance of Attorney's Fees for Ordinary Services and Costs; and (4) for Final Distribution

DOD: 11/02/2009	PAIGE MCKERRAL HANKS, Administrator, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR. Amended Waiver of Accounting filed 01/22/2015. Hearing is set for 03/01/2016.</u></p>
	Accounting is waived.	
Cont. from 022415, 051915, 082515, 120115	I&A - \$252,951.29 POH - \$213,847.50	
<input type="checkbox"/> Aff.Sub.Wit.	Administrator – Waives	
<input checked="" type="checkbox"/> Verified	Attorney - \$8,468.23 (see notes #2 & 4)	
<input checked="" type="checkbox"/> Inventory	Attorney Reimbursement - \$1,152.17 (filing fees, publication, certified copies, probate referee fees)	
<input type="checkbox"/> PTC		
<input checked="" type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Petitioner requests distribution as follows:	
<input checked="" type="checkbox"/> Aff.Mail	w/	
<input type="checkbox"/> Aff.Pub.	Paige McKerral-Hanks and Stephen C. Luder, Co Trustees of the Parker Gillespie, Jr. Trust – \$5,676.50 cash, 200 shares PG&E Corporation common stock, residence at 1467 E. Mesa Ave Fresno, Ca..	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters	08/26/13	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 9202		
<input type="checkbox"/> Order	x	
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LV
		Reviewed on: 01/22/2016
		Updates:
		Recommendation:
		File 6 - Gillespie

7

Ayden Medeiros & Ayla Lopez (GUARD/P) Case No. 14CEPR00219

Petitioner Medeiros, Brandy (Pro Per – Paternal Grandmother – Petitioner)

Petitioner Franco, Elaine (Pro Per – Maternal Grandmother – Petitioner)

Petition for Appointment of Guardian of the Person (Prob. Code §1510)

		<p>Se petition for details.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 1/12/16:</u> The Court orders Elaine Franco to report immediately to Avertest and submit to a urine drug test. Ms. Franco is to pay the cost of said test and bring the results to court on 1/26/16.</p> <p><u>Note:</u> On 12/31/15, Petitioner Brandy Medeiros filed a Declaration providing an agreement and schedule of visitation and residence between the two petitioners designating holidays.</p>	
Cont. from 102715, 120115, 011216				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			W
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
				Reviewed by: skc
			Reviewed on: 1/21/16	
			Updates:	
			Recommendation:	
			File 7 – Medeiros/Lopez	

Attorney Steven M. Matlak (for Co-Trustees Stanley Rudd and Suzanne Rudd)

Petition for Settlement of First Account Current and Report of Co-trustees; and for Approval of Attorney's Fees and Costs

	<p>STANLEY D. RUDD and SUZANNE M. RUDD, parents and Limited Co-Conservators of the Person and Estate who were appointed as Co-Trustees of the KEITH ALLAN RUDD SPECIAL NEEDS TRUST on 10/6/2014, are Petitioners.</p>		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note for background:</u> Conservatorship of the Person (Case 04CEPR01023) was established in 1995 with Petitioners appointed as Limited Co-Conservators; in 2004 COZETTE M. GAHAN and JACQUELINE BJERRUM (Keith's cousins), were appointed Successor Limited Co-Conservators of the Person, and the Petitioners were appointed Co-Conservators of the Estate on 4/30/2014. Order Establishing Special Needs Trust with Authority to Invest in Mutual Funds, etc., was filed 10/6/2014.</p>
	<p>Account period: 10/6/2014 – 9/30/2015</p>		
	Aff.Sub.Wit.	Accounting - \$116,977.73	
✓	Verified	Beginning POH - \$0.00	
	Inventory	Ending POH - \$104,155.10	
	PTC	<i>(\$114,586.00 lump sum payment on 10/16/2014 from father's Social Security Retirement, funds placed in mutual funds; wheelchair purchased 4/6/2015; and \$6,383.45 cash)</i>	
	Not.Cred.		
✓	Notice of Hrg	Co-Trustees - waive	
✓	Aff.Mail	Co-Trustee Costs - \$1,073.00 (paid)	
	Aff.Pub.	<i>(reimburse bond premium and court investigation fee for conservatorship;)</i>	
	Sp.Ntc.	Attorney - \$2,711.00	
	Pers.Serv.	<i>(per Declaration filed 12/1/2015 and itemization attached as Exhibit B; for 16.4 hours @ \$135/hr, \$140/hr, and \$260/hr rates;)</i>	
	Conf. Screen	Merrill Lynch Wealth - \$1,668.25 (paid)	
	Letters	<i>(monthly investment advisory fees 10/2014 to 9/2015; invested in portfolio to provide Income and Growth over long term;)</i>	
	Duties/Supp	Attorney Costs - \$200.00	
	Objections	<i>(filing fee for first account)</i>	
	Video Receipt	Bond - \$123,310.00	
	CI Report	<i>(sufficient)</i>	
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice	<p>Petitioner prays for an Order:</p> <p>5. Approving, allowing and settling the First Account and Report of Co-Trustees, and ratifying, approving, and confirming all acts and transactions of Petitioners as set forth in the petition; and</p> <p>6. Authorizing payment of the attorney fees and reimbursement of costs.</p>	

Reviewed by: LEG
Reviewed on: 1/22/16
Updates:
Recommendation:
File 8- Rudd

Petitioner Freitas, Amanda Jean (Pro Per – Mother)

Petition for Visitation

Jayden, 13	AMANDA JEAN FREITAS, Mother, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Beau, 8		
		Minute Order of 12/01/2015: Examiner notes provided in open court.
Cont. from 120115		The following issues remain:
Aff.Sub.Wit.		1. Need Notice of Hearing.
✓ Verified		2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing on Guardians Codie and Nicholas Azevedo.
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	x	
Aff.Mail	x	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order	n/a	
Aff. Posting		Reviewed by: LV
Status Rpt		Reviewed on: 01/22/2016
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 9 – Freitas

Waiver of Accounting and Petition for Final Distribution under Will and Allowance of Statutory Attorney's Fees

DOD: 12/13/13		<p>ERIN E. MESSER, Executor, is petitioner.</p> <p>Accounting is waived.</p> <p>I &A - \$325,000.00 POH - \$325,000.00</p> <p>Executor - waives</p> <p>Attorney - \$9,500.00 (statutory, payable \$3,800.00 to Jeffrey Simonian, former attorney for Executor, and \$5,700.00 to Kevin Gunner)</p> <p>Distribution, pursuant to Decedent's Will and assignment of interest, is to:</p> <p>Erin E. Messer - 100% interest in real property.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Petition states notice of the initiation of this probate proceeding was served on the Franchise Tax Board, as shown on the proof of service of the Notice of Petition to Administer the Estate, filed herein. However, the Notice of Petition to Administer the Estate filed in this case does not show service on the Franchise Tax Board. Therefore need proof of service on the Franchise Tax Board pursuant to Probate Code 9202(c)(1).</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail W/O		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice X		
		<p>Reviewed by: KT</p> <p>Reviewed on: 1/22/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 10- Ryan</p>	

11A In Re: The Ostergaard Family Trust

Case No. 15CEPR00449

Attorney: Michael M. Buettner (for Trustee Michael Mehling)
 Attorney: C. Russell Georgeson (co-counsel for Michael Mehling)
 Attorney: Mark E. Chielpegian (for Petitioner Karlene L. Stefani)

Petition to Modify First Amendment

		KARLENE L. STEFANI is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of service of the Notice of Hearing on:</p> <ul style="list-style-type: none"> a. Michael Mehling (Trustee) b. Linda K. Ostegaard (beneficiary) c. Drake A. Stefani (beneficiary) d. Darien J. Stefani (beneficiary) e. Briemann N. Sefani (beneficiary) <p>- Probate Code §17203 and California Rules of Court, Rule, 7.51.</p>
		Petitioner alleges:	
		On 3/13/03, CARL E. OSTERGAARD and LAVERNA F. OSTERGAARD , created THE OSTERGAARD FAMILY TRUST (the "Trust").	
Cont. from		The Trust was amended on 11/19/12 (the "First Amendment").	
	Aff.Sub.Wit.	Carl E. Ostergaard died on 3/26/13.	
✓	Verified	Laverna F. Ostergaard died on 9/18/14.	
	Inventory	MICHAEL MEHLING is the current acting Trustee of the Trust, as amended by the First Amendment.	
	PTC	Upon the death of Laverna F. Ostergaard, the Trust, as amended by the First Amendment, was to be divided into five (5) separate shares for the benefit of Petitioner, Petitioner's sister, LINDA K. OSTERGAARD ("Kathy") , and the living children of Petitioner, DRAKE A. STEFANI, DARIEN J. STEFANI and BRIEANN N. STEFANI in the following shares:	
	Not.Cred.	<ul style="list-style-type: none"> • 25% of the Trust Estate, in trust, for the benefit of Petitioner; • 50% of the Trust Estate, in trust, for the benefit of Kathy; • 8 1/3%, of the Trust Estate, in trust, for the benefit of Drake A. Stefani; • 8 1/3%, of the Trust Estate, in trust, for the benefit of Darien J. Stefani; • 8 1/3%, of the Trust Estate, in trust, for the benefit of Briemann N. Stefani. 	
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		Please see additional page	
		Reviewed by: KT	
		Reviewed on: 1/22/16	
		Updates:	
		Recommendation:	
		File 11A- Ostergaard	

Petitioner further alleges:

IN addition to cash and other liquid assets, the Trust Estate consists of the following real property located in Fresno County listed with values as of 9/14/14:

i.	APN: 326-080-31	\$ 200,000.00
ii.	APN: 326-080-29	\$ 35,000.00
iii.	APN: 326-080-30	\$ 85,000.00
iv.	APN: 326-080-08	\$ 35,000.00
v.	APN: 326-080-51	<u>\$ 100,000.00</u>
	TOTAL	\$ 455,000.00

Petitioner seeks to modify the First Amendment to provide that the real property shall be specifically allocated and distributed to each subtrust established by the First Amendment, at the date of death values as follows:

- a. The Trustee shall allocate and distribute to the trust created for the benefit of Karlene L. Stefani and undivided 50% interest in the following real property as part of her 25% share of the overall Trust Estate:

i.	APN: 326-080-30	\$ 42,500.00
ii.	APN: 326-080-08	\$ 17,500.00
iii.	APN: 326-080-51	<u>\$ 50,000.00</u>
	Total	\$ 110,000.00

- b. The Trustee shall allocate and distribute to the trust created for the benefit of Drake A. Stefani and undivided 1/6th interest in the following real property as part of his 1/12th share of the overall Trust Estate:

i.	APN: 326-080-30	\$ 14,166.67
ii.	APN: 326-080-08	\$ 5,833.33
iii.	APN: 326-080-51	<u>\$ 16,666.66</u>
	Total	\$ 36,666.66

- c. The Trustee shall allocate and distribute to the trust created for the benefit of Darien J. Stefani and undivided 1/6th interest in the following real property as part of his 1/12th share of the overall Trust Estate:

i.	APN: 326-080-30	\$ 14,166.67
ii.	APN: 326-080-08	\$ 5,833.33
iii.	APN: 326-080-51	<u>\$ 16,666.66</u>
	Total	\$ 36,666.66

Please see additional page

d. The Trustee shall allocate and distribute to the trust created for the benefit of Briemann N. Stefani and undivided 1/6th interest in the following real property as part of his 1/12th share of the overall Trust Estate:

i.	APN: 326-080-30	\$ 14,166.67
ii.	APN: 326-080-08	\$ 5,833.33
iii.	APN: 326-080-51	<u>\$ 16,666.66</u>
	Total	\$ 36,666.66

e. The Trustee shall allocate and distribute to the trust created for the benefit of Linda K. Ostergaard and undivided interest in the following real property as part of her 50% share of the overall Trust Estate:

i.	APN: 326-080-31	\$ 200,000.00
ii.	APN: 326-080-29	<u>\$ 35,000.00</u>
	TOTAL	\$ 235,000.00

As part of the allocation and distribution of the real property to various subtrusts, as provided above, Linda will receive \$15,000.00 on overall value of the Trust Estate. Therefore, in order to equalize distribution of the Trust Estate, cash in the amount of \$15,000.00 shall be distributed as follows:

- a. To the Trust created for the benefit of Karlene L. Stefani, cash in the amount of \$7,500.00;
- b. To the Trust created for the benefit of Drake A. Stefani, cash in the amount of \$2,500.00;
- c. To the Trust created for the benefit of Darien J. Stefani, cash in the amount of \$2,500.00;
- d. To the Trust created for the benefit of Briemann N. Stefani, cash in the amount of \$2,500.00.

Petitioner further seeks to modify the First Amendment to provide that the real property immediately be distributed free of trust, to the beneficiary of each trust.

All the current and remainder beneficiaries of the Trust and each subtrust consent to the proposed allocation and distribution of the real property.

The proposed modification will not impair the interest of any beneficiary of the Trust.

The proposed modification is necessary given that the Trustee is disregarding the wishes and desires of the beneficiaries, without justification, and is attempting to force the sale of the real property over the objections of all the beneficiaries. Despite there being no compelling need or requirement for sale, the Trustee is adamant that the property must be sold. Moreover, Petitioner believes that the Trustee is incurring unnecessary (i) attorneys' fees and costs in connection with the proposed forced sale of the real property, and (ii) maintenance and management expenses for the ongoing care and maintenance of the real property.

Please see additional page

Pursuant to Probate Code §15403(a) "if all beneficiaries of an irrevocable trust consent, they may compel modification or termination of the trust upon petition to the court."

In the instant matter, all of the lifetime beneficiaries, and the adult contingent remainder beneficiaries of the Trust have consented to the proposed modification.

Wherefore, Petitioner prays for an order of this court:

1. Granting the Petition to Modify First Amendment;
2. Modifying the First Amendment as set forth in Exhibit E of the Petition.

11B In Re: The Ostergaard Family Trust

Case No. 15CEPR00449

Attorney: Michael M. Buettner (for Trustee Michael Mehling)

Attorney: C. Russell Georgeson (co-counsel for Michael Mehling)

Attorney: Mark E. Chielpegian (for Respondent Karlene L. Stefani)

Notice of Motion and Motion to Compel Further Responses to Discovery and Request for Sanctions; Memorandum of Points and Authorities

	KARLENE L. STEFANI is Respondent.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>2. Need proof of service of the Notice of Hearing on: f. Michael Mehling (Trustee) - Probate Code §17203 and California Rules of Court, Rule, 7.51.</p> <p>3. Need Order</p>
	Respondent alleges:	
	On 3/13/03, CARL E. OSTERGAARD and LAVERNA F. OSTERGAARD , created THE OSTERGAARD FAMILY TRUST (the "Trust").	
Cont. from	The Trust was amended on 11/19/12 (the "First Amendment").	
Aff.Sub.Wit.		
Verified	X	
Inventory		
PTC		
Not.Cred.	Carl E. Ostergaard died on 3/26/13.	
<input checked="" type="checkbox"/> Notice of Hrg	Laverna F. Ostergaard died on 9/18/14.	
<input checked="" type="checkbox"/> Aff.Mail	MICHAEL MEHLING is the current acting Trustee of the Trust, as amended by the First Amendment.	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	The Trust Estate consists of five (5) parcels of real property. All of the beneficiaries of the Trust, and each of the subtrusts created thereunder, have reached a written agreement as to the allocation and distribution of the various parcels of real property. Notwithstanding such written agreement by the beneficiaries of the Trust, Mehling is insisting, over the express objections of all of the beneficiaries and without any substantial justification or apparent necessity, that the real property must be sold and is seeking approval from this Court to proceed with such sale.	
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order	X	
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	Please see additional page	<p>Reviewed by: KT</p> <p>Reviewed on: 1/22/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11B- Ostergaard</p>

Respondent states she served her first set of special interrogatories, first set of document requests and first set of requests for admissions by mail on July 9, 2015. Mehling served his responses to Respondent's discovery on August 17, 2015.

Mehling's responses were deficient. Respondent's counsel attempted to meet and confer with Mehling's counsel. Subsequently, on November 4, 2015, Mehling served supplemental discovery responses which addressed some but not nearly all of the deficiencies contained in his initial responses.

Mehling persists in his refusal to provide full and completed responses to several of respondent's lawfully propounded discovery requests.

Law and Argument provided in the Motion.

Statement of Discovery Responses in Dispute filed on 11/20/15 contains 131 pages of disputed discovery responses.

Due to Mehling's misuse of the discovery process, Respondent's counsel was forced to spend more than eight hours drafting this motion and Respondent was forced to incur motion filing fees with the Court. Respondent therefore respectfully requests an award of sanctions against Mehling in the amount of \$2,780.00, subject to adjustment relating to the preparation of a reply brief and Respondent's counsel's appearance at the hearing on the motion.

Conclusion:

For all the foregoing reasons, Respondent respectfully requests that this Court: (a) order Mehling to provide substantive, verified responses to respondent's first set of form and special interrogatories, first set of document request and first set of requests for admissions within five (5) days; and (b) order Mehling to personally pay monetary sanctions in the amount of \$2,780.00.

Petitioner, Michael Mehling's Opposition to Respondent Karlene L. Stefani's Separate Statement of Discovery Responses in Dispute in Support of Motion to Compel Further Responses to Discovery and Request for Sanctions filed on 1/12/16 contains 118 pages of disputed responses to interrogatories and the reason why he should not have to answer them.

Memorandum of Points and Authorities in Reply to Petitioner's Opposition to Motion to Compel Further Responses to Discovery and Request for Sanctions filed on 1/19/16

11C In Re: The Ostergaard Family Trust

Case No. 15CEPR00449

Attorney: Michael M. Buettner (for Trustee Michael Mehling)

Attorney: C. Russell Georgeson (co-counsel for Michael Mehling)

Attorney: Mark E. Chielpegian (for Petitioner Karlene L. Stefani)

Petition to 1) Compel Trustee to Account, 2) Remove Trustee and Appoint Successor, and 3) Surcharge Trustee for Breaches of Trust

		KARLENE L. STEFANI is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Petition does not name a proposed successor trustee. Order contains a place to insert a date for a hearing for the purpose of nominating and appointing a successor trustee. Order also contains a place to insert a date for a hearing for the purpose of surcharging Trustee, Michael Mehling.</p>
		Petitioner alleges:	
		On 3/13/03, CARL E. OSTERGAARD and LAVERNA F. OSTERGAARD , created THE OSTERGAARD FAMILY TRUST (the "Trust").	
Cont. from		The Trust was amended on 11/19/12 (the "First Amendment").	
<input type="checkbox"/>	Aff.Sub.Wit.	Carl E. Ostergaard died on 3/26/13.	
<input checked="" type="checkbox"/>	Verified	Laverna F. Ostergaard died on 9/18/14.	
<input type="checkbox"/>	Inventory	MICHAEL MEHLING is the current acting Trustee of the Trust, as amended by the First Amendment.	
<input type="checkbox"/>	PTC	Petitioner seeks an Order to compel the Trustee to account. Petitioner states she made the request to account on July 8, 2015; however to date no accounting has been provided.	
<input type="checkbox"/>	Not.Cred.	Moreover the accounting is required because the Trustee has failed and refused to keep the beneficiaries reasonably informed as to the administration of the trust or to report to the beneficiaries upon request in violation of Probate Code §16060 and 16061. In particular, information regarding the administration of the Trust estate was requested through formal discovery on July 9, 2015, in an effort to compel responses under penalty of perjury. The Trustee failed and refused to response to various requests without reasonable justification.	
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail		
	W/		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
Please see additional page			<p>Reviewed by: KT</p> <p>Reviewed on: 1/25/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11C- Ostergaard</p>

Petitioner alleges that Trustee, Michael Mehling should be removed from the office of trustee because he violated the fiduciary duties owed to Laverne F. Ostergaard, as settlor and the initial beneficiary of the Trust, and to Petitioner, as a current beneficiary of the Trust. Mr. Mehling has failed to act with care, skill, prudence, and diligence, and has breached his duty of loyalty to the beneficiaries, has failed to deal impartially with the beneficiaries, has failed to avoid conflicts of interest, has failed to keep the beneficiaries reasonably informed of the administration of the Trust and has failed to consider the anticipated needs of the Trust and the beneficiaries thereof, among other improper conduct. The Trustee has, among other things:

1. Consistently failed and refused to keep the beneficiaries reasonably informed as to the administration of the Trust. And has further attempted to conceal and hide his improper conduct from the beneficiaries.
2. Consistently failed and refused to provide information and other documentation related to the administration of the Trust.
3. Failed and refuses to provide, or otherwise direct his attorney, Michael Buttner, to provide a complete and accurate copy of the Ostergaards estate planning file, which file is relevant to claims being made by the Trustee as to the Ostergaard's testamentary intent.
4. Field and refused beneficiaries' direction and request as to the allocation and division of the real property among the various subtrusts.
5. Breached the express terms of the Trust by selling personal property that was to be distributed and allocated equally to Petitioner and Petitioner's sister Kathy.
6. Breached the express terms of the trust by failing and refusing to make and annual distribution of principal and interest on or about September 2015 to the beneficiaries as required under the express terms of the Trust.
7. Managed the trust in an imprudent manner in that the Trustee is seeking to sell the real property at a substantial cost and expense to the Trust despite objection of the beneficiary to such sale.
8. Breached the express terms of the Trust by failing and refusing to provide an accounting within ninety days upon request of a beneficiary.
9. Engaged in a series of self-interested transactions whereby the Trustee sold assets of the trust to family members and/or friends of the Trustee. For example, the Trustee sold a certain Glock 40mm auto pistol that was to be distributed to Petitioner and Kathy, to Trustee's wife, Tanya A. Mehling.
10. Engaged in a series of self-interested transactions whereby the Trustee hired family members and/or employees of family members at the expense of the Trust estate.
11. Incurred substantial attorney's fees and cost by hiring two different law firms in an attempt to compel the sale of certain real property,

Please see additional page

12. Attempted to hide and conceal his breaches of trust by refusing to provide documentation and information to the beneficiaries.
13. Attempted to create conflict between Petitioner and Kathy in an effort to further the Trustee's own personal benefit, and to use such purported conflict to further the Trustee's self-interested desire to sell the real property.
14. Managed the Trust in an imprudent manner in that the Trustee has incurred imprudent and unnecessary maintenance and repair expenses solely to the detriment of the beneficiaries.
15. Sold or otherwise disposed of property for less than fair market value.

As a result of the Trustee's conduct and his various breaches of his fiduciary duties owed to Laverna F. Ostergaard, and to Petitioner, and the other beneficiaries of the Trust, and each subtrust thereto, Petitioner has been damaged in an amount to be determined according to proof at trial.

Wherefore, Petitioner prays for an order of this Court that:

1. The Court grant the Petition to (1) Compel Trustee to Account, (2) Remove the Trustee and Appoint Successor, and (3) Surcharge Trustee for Breaches of Trust;
2. The court Compel Michael Mehling to supply Petitioner with an accounting of trustee's administration of the Trust for the period of his appointment on January 15, 2014 through the date of his removal;
3. Michael Mehling file and accounting with the Court within 15 days of the date of this Court's Order to account, detailing the acts of Michael Mehling as Trustee of the Trust for the period of January 15, 2014 through the date of his removal;
4. The Court surcharge Michael Mehling as trustee for his breaches of trust according to proof;
5. The Court compel Michale Mehling to turn over all personal property of the Trust purportedly sold by Michael Mehling, as trustee, to Michael Mehling or his spouse including without limitation the Glock 40mm auto pistol;
6. The Court remove Michael Mehling as trustee of the Trust;
7. The Court appoint a successor trustee for the Trust;
8. The Court award reasonable attorneys' fees and costs to the Petitioner.

First and Final Report and Petition for Its Settlement, for Allowance of Attorneys' Statutory Fees, and for Final Distribution of Estate Under Will on Waiver of Account

DOD: 04/09/15	SHELLY L. HILL , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Accounting is waived.	
	I & A - \$217,723.44	
	POH - \$217,500.00	
Cont. from	Executor - waived	
Aff.Sub.Wit.	Attorney - \$7,354.00 (statutory, to be paid outside of the estate)	
<input checked="" type="checkbox"/> Verified	Costs - \$1,473.00 (filing fees, certified copies, publication, recording fees; to be paid outside of the estate)	
<input checked="" type="checkbox"/> Inventory	Distribution, pursuant to decedent's will, is to:	
<input checked="" type="checkbox"/> PTC	Shelly L. Hill - ½ interest in real property, ½ interest in a vehicle and ½ interest in household furniture, furnishings and personal effects	
<input checked="" type="checkbox"/> Not.Cred.	Kelly A. Johnson - ½ interest in real property, ½ interest in a vehicle and ½ interest in household furniture, furnishings and personal effects	
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail w/		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters 06/30/15		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
<input checked="" type="checkbox"/> FTB Notice		
	Reviewed by: JF	
	Reviewed on: 01/22/16	
	Updates:	
	Recommendation: SUBMITTED	
	File 12- Norton	

Order to Show Cause – Pre RE: Failure to File the Inventory and Appraisal

DOD: 4/1/15	<p>CRAIG JOSEPH BRANDON, Son, was appointed Executor with Full IAEA without bond on 7/1/15. Letters issued 7/2/15.</p> <p>At the hearing on 7/1/15, the Court set a status hearing for the filing of the Inventory and Appraisal on 12/01/15.</p> <p>Minute Order from hearing on 12/01/15 set this hearing for an OSC re Failure to File the Inventory & Appraisal and states: NO APPEARANCES – The Court issues an Order to Show Cause to Craig Joseph Brandon as to why he should not be removed for failure to file the Inventory & Appraisal and orders him to be personally present in court on 01/26/16.</p> <p>Inventory & Appraisal, final, filed 12/15/15 - \$152,261.50</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Minute Order from 12/01/15 ordered that Mr. Brandon be present in court on 01/26/16; therefore this matter was not taken off calendar even though the final Inventory & Appraisal was filed on 12/15/15</p>
Cont. from		
Aff.Sub.Wit.		
Verified		
✓ Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	Reviewed by: JF	
	Reviewed on: 01/22/16	
	Updates:	
	Recommendation:	
	File 13- Brandon	

Petitioner
Petitioner

Lomeli-Marashlian, Erica (Pro Per – Maternal Aunt – Petitioner)
Salazar, Christopher Manuel (Pro Per – Brother – Petitioner)

Petition for Appointment of Guardian of the Person (Prob. Code §1510)

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 12/8/15:</u> Mario Herrera, Jr., father, is served a copy of the petition by the deputy in open court. Any written objections are to be filed and properly served no later than 1/5/16.</p> <p><u>Note:</u> As of 1/21/16, no objections have been filed by Mr. Herrera. <u>However, the minor filed a new declaration on 1/21/16.</u></p>	
Cont. from 081115, 092215, 102715, 120815				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			W
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input checked="" type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	Clearances			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
				Reviewed by: skc
				Reviewed on: 1/21/16
		Updates:		
		Recommendation:		
		File 14 – Herrera		

Petition for Appointment of Guardian of the Person

		TEMPORARY EXPIRES 1/26/16	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 12/1/15. Minute order states the court investigator is ordered to re-interview the parties and provide the Court with an updated recommendation.</p> <p>Minute order dated 7/2/15, granting the temporary guardianship, ordered that there was to be no unsupervised or overnight visits for the parents.</p> <ol style="list-style-type: none"> 1. Need proof of service of the Notice of Hearing along with a copy of the petition or Consent and Waiver of Notice on: <ol style="list-style-type: none"> a. Tracy Jones (maternal grandmother) – unless the court dispenses with notice. b. Terrance Bryant (paternal grandfather) – unless the court dispenses with notice. c. Chantel Standifer (paternal grandmother) – unless the court dispenses with notice. 	
		<p>DAYNNA WOOD, non-relative/maternal grandfather's girlfriend, is petitioner.</p> <p>Please see petition for details.</p> <p>Court Investigator Report filed on 8/19/15</p> <p>Declaration of Dayna Wood filed on 9/29/15</p> <p>Court Investigator Supplemental Report filed on 1/21/16</p>		
Cont. from 082415, 100515, 120115				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W/		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
				<p>Reviewed by: KT</p> <p>Reviewed on: 1/21/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 15 – Bryant</p>

Probate Status Hearing RE: Additional Insurance Monies

		<p>LOIDA AURORA IN, Mother, was appointed Guardian of the Estate on 8/11/15 without bond, with all funds placed into a blocked account. Letters issued 8/13/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Petition to authorize collection of assets filed 1/12/16 is set for hearing on 2/23/16.</p> <p><u>Minute Order 1/12/16</u>: Counsel represents that the monies have not yet been received; she will be filing a petition today to authorize collection of the monies from MetLife. If the petition and I&A are both filed at least two court days prior, then no appearance is necessary on 1/26/16.</p>
<p>Cont. from 011216</p>			
<input type="checkbox"/>	Aff.Sub.Wit.	<p>The Court set a status hearing for the filing of the receipt for blocked account.</p>	
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: skc</p>	
		<p>Reviewed on: 1/21/16</p>	
		<p>Updates:</p>	
		<p>Recommendation:</p>	
		<p>File 16A- In</p>	

Probate Status Hearing RE: Filing of the Inventory and Appraisal

		<p>LOIDA AURORA IN, Mother, was appointed Guardian of the Estate on 8/11/15 without bond, with all funds placed into a blocked account. Letters issued 8/13/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Final I&A filed 1/12/16</p>
<p>Cont. from 011216</p>			
<input type="checkbox"/>	Aff.Sub.Wit.	<p>The Court set this status hearing for the filing of the Inventory and Appraisal.</p>	
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			<p>Reviewed by: skc</p> <p>Reviewed on: 1/21/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 16B- In</p>

Petition for Appointment of Guardian of the Person (Prob. Code §1510)

	See petition for details.	NEEDS/PROBLEMS/COMMENTS:
		Continued from 12/1/15. All notice issues have now been cured.
Cont. from 100515, 120115		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	W	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv.	W	
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> Clearances		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: skc
		Reviewed on: 1/21/16
		Updates:
		Recommendation:
		File 17 – Portillo & Bryant

Petitioner Garza, Christina (Pro Per – Maternal Aunt – Petitioner)
 Petitioner Sandoval, Robert (Pro Per – Maternal Uncle – Petitioner)

Petition for Appointment of Guardian of the Person

Ryan, 15	<p style="text-align: center;"><u>TEMPORARY EXPIRES 01/26/16</u></p> <p>CHRISTINA GARZA and ROBERT SANDOVAL, Maternal Aunt and Uncle, are Petitioners.</p> <p>Father (Ryan): BYRON KINCADE (Deceased) Father (Serenity): JEREMY MARK OLSEN – <i>Consent & Waiver of Notice filed 09/24/15</i></p> <p>Mother: JESSICA BOHANNON – <i>Personally served on 08/19/15</i></p> <p>Paternal Grandfather (Ryan): Unknown – <i>court dispensed with notice on 10/05/15</i> Paternal Grandmother (Ryan): Sherri Spicer – <i>Declaration of Due Diligence filed 11/30/15</i></p> <p>Paternal Grandfather (Serenity): Unknown – <i>court dispensed with notice on 10/05/15</i> Paternal Grandmother (Serenity): GERALDINE OLSEN</p> <p>Maternal Grandfather: Deceased Maternal Grandmother: Ellen Vasquez – <i>Consent & Waiver of Notice filed 08/13/15</i></p> <p>Petitioners state [see file].</p> <p>Court Investigator Charlotte Bien filed a report on 09/21/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 12/01/15</u> Minute Order from 12/01/15 states: Matter is continued for service or consent as to Sheri Spicer and Geraldine Olsen, the paternal grandmother of Serenity.</p> <p>As of 01/21/16, nothing further has been filed since the last hearing.</p> <p>1. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person or Consent & Waiver of Notice or Declaration of Due Diligence</i> for:</p> <p>a. Sheri Spicer (Ryan's paternal grandmother) b. Geraldine Olsen (Serenity's paternal grandmother)</p>	
Serenity, 13			
Cont. from 100515, 120115			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
Aff.Mail			x
Aff.Pub.			
Sp.Ntc.			
✓ Pers.Serv.			
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
✓ CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
		Reviewed by: JF	
		Reviewed on: 01/21/16	
		Updates:	
		Recommendation:	
		File 18 – Kincade & Olsen	

Petitioner Castillo, Valerie (pro per – maternal aunt)

Petition for Appointment of Guardian of the Person

Keanna, 16	<u>TEMPORARY EXPIRES 01/26/16</u>		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 12/01/15</u> As of 01/21/16, nothing further has been filed and the following notes remain:</p> <ol style="list-style-type: none"> 1. Need proof of service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for: <ol style="list-style-type: none"> a. Keanna Tokumoto (minor) – <i>personal service needed</i> b. Byron Tokumoto (Keanna's father) – <i>personal service needed</i> c. Keanna's paternal grandfather – <i>service by mail ok</i> d. Hiroko Tokumoto (paternal grandmother) – <i>service by mail ok</i> e. Will Bailey (Zoe's father) – <i>personal service needed</i> f. Zoe's paternal grandparents – <i>service by mail ok</i> g. Shawn McNeely (Ryan's father) – <i>personal service needed</i> h. Ryan's paternal grandparents – <i>service by mail ok</i>
Zoe, 9	<p>VALERIE CASTILLO, maternal aunt, is Petitioner.</p> <p>Mother: PATRICIA CASTILLO – <i>personally served on 10/01/15</i></p> <p>Maternal grandfather: VALENTINE CASTILLO – <i>served by mail on 09/25/15</i></p> <p>Maternal grandmother: ROSIE CALDERON – <i>served by mail on 09/25/15</i></p> <p>KEANNA: Father: BYRON TOKUMOTO Paternal grandfather: UNKNOWN Paternal grandmother: HIROKO TOKUMOTO</p> <p>ZOE: Father: WILL BAILEY Paternal grandparents: UNKNOWN</p> <p>RYAN: Father: SHAWN MCNEELY Paternal grandparents: UNKNOWN</p> <p>Petitioner states [see file for details].</p> <p>Objection to Guardianship filed 10/22/15 by Patricia Castillo (mother).</p> <p>Court Investigator Dina Calvillo filed a report on 11/23/15.</p> <p>Declaration of Patricia Castillo (mother) filed 11/25/15.</p>		
Ryan, 5			
Cont. from 120115			
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	w/		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input checked="" type="checkbox"/> Pers.Serv.	w/		
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input checked="" type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input checked="" type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input checked="" type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed by: JF
			Reviewed on: 01/21/16
			Updates:
			Recommendation:
			File 19 – Tokumoto/Bailey/Castillo

Petitioner Onyegegbu, Ikemefuna (pro per – Maternal uncle)
 Petitioner Marquez, Lisa Lee (pro per – maternal aunt)

Petition for Appointment of Guardian of the Person

Deshawn, 18	<u>TEMPORARY EXPIRES 01/26/16</u>		<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Note: Deshawn Deloach turned 18 on 01/20/16, therefore this Petition for guardianship no longer applies to him.</p> <p><u>CONTINUED FROM 12/01/15</u> As of 01/21/16, nothing further has been filed and the following notes remain:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person or Consent & Waiver of Notice or Declaration of Due Diligence for: <ol style="list-style-type: none"> a. Deshawn DeLoach – personal service needed b. Deshawn and Deyviana's paternal grandfather – service by mail ok c. Francis Onyegegbu – service by mail ok d. Brenda Anderson – service by mail ok e. Monica Vasquez (sibling) – service by mail needed if age 12 or over
Deyviana, 15	<p>IKEMEFUNA ONYEGEGBU and LISA LEE MARQUEZ, Maternal Uncle and Aunt, are Petitioners.</p>		
Benjamin, 5	<p>Father (Deshawn and Deyviana): DESHAWN DELOACH - Declaration of Due Diligence filed 9/28/15</p>		
Cont. from 120115	<p>Father (Benjamin): BENJAMIN VASQUEZ - Deceased; Court dispensed with notice on 10/27/15</p>		
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC	<p>Mother: LENETTA THOMAS - Served by text per Min Order 10/6/15; Court dispensed with notice on 10/27/15</p>		
Not.Cred.			
Notice of Hrg	X	Paternal Grandfather (Deshawn and Deyviana): Unknown	
Aff.Mail	X	Paternal Grandmother (Deshawn and Deyviana): Alice Deloach – Deceased	
Aff.Pub.			
Sp.Ntc.		Paternal grandparents (Benjamin): Deceased	
Pers.Serv.	X		
✓ Conf. Screen		Maternal Grandfather: Francis Onyegegbu Maternal Grandmother: Brenda Anderson	
✓ Letters		Siblings: Monica A. Vasquez	
✓ Duties/Supp		Petitioners state [see file].	
Objections		Letters of Recommendation/in Support of Petitioner filed 10/02/15.	
Video Receipt			
✓ CI Report		Objection to Guardianship filed 11/17/15 by Lenetta Thomas (mother).	
9202			
✓ Order		Court Investigator Samantha Henson filed a report on 11/24/15.	
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
			Reviewed by: JF
			Reviewed on: 01/21/16
			Updates:
			Recommendation:
			File 20 – Deloach/Vasquez

Petitioner Soto, Jasmine (pro per – maternal aunt)

Petition for Appointment of Guardian of the Person

Israel, 11	<u>TEMPORARY EXPIRES 01/26/16</u>		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> <i>Consent & Waiver of Notice</i> for:</p> <p>a. Israel Solorzano (Israel's father) – <i>personal service required; unless diligence is found</i></p> <p>b. David Joseph Stiles (David's father) - <i>personal service required; unless diligence is found</i></p> <p>c. Jenessy's father (unknown) - <i>personal service required; unless diligence is found</i></p> <p>d. All paternal grandparents – <i>service by mail ok; unless diligence is found</i></p> <p>Note: Proof of Service regarding Dave Maggard (maternal grandfather) states that he was served by mail on 01/21/16 – only 5 days' notice. The Probate Code requires 15 days' notice</p>
David, 5	<p>JASMINE SOTO, maternal aunt, is Petitioner.</p>		
Jenessy, 2	<p>Mother: JOSEPHINE MAGGARD – <i>personally served on 11/27/15</i> Maternal grandfather: DAVE MAGGARD – <i>served by mail on 01/21/16</i> Maternal grandmother: EMILY VALDEZ – <i>personally served on 11/27/15</i></p>		
Cont. from			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
Aff.Mail	x		
Aff.Pub.			
Sp.Ntc.			
✓ Pers.Serv.	w/		
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
✓ CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			

Petition for Appointment of Guardian of the Person

Age: 16		<p align="center"><u>NO TEMPORARY IN PLACE;</u> <u>TEMPORARY DENIED ON 12/02/15</u></p> <p>JESSICA REYES, aunt, is Petitioner.</p> <p>Father: VINCENT CRUZ – personally served on 11/24/15 Mother: ASIA REYES – personally served on 11/24/15</p> <p>Paternal grandfather: DANIEL REYES Paternal grandmother: SYLVIA REYES</p> <p>Maternal grandparents: NOT LISTED</p> <p>Siblings: ALYSSA CRUZ, ARIC CRUZ</p> <p>Petitioner states [see file for details].</p> <p>Court Investigator Samantha Henson filed a report on 01/21/16.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for:</p> <p>a. Daniel Reyes (paternal grandfather) b. Sylvia Reyes c. Maternal grandparents d. Any sibling age 12 and over</p>	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input type="checkbox"/>	Aff.Mail			x
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			w/
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p>Reviewed by: JF</p> <p>Reviewed on: 01/22/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 22- Cruz</p>		

Petition for Appointment of Guardian of the Person

Age: 3	<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS:
	TRINA THAMES-BROWN , paternal grandmother, is Petitioner.	1. Need proof of service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: <ul style="list-style-type: none"> a. Erika Jones (mother) – <i>personal service needed; service by mail is insufficient</i> b. Paternal grandfather – <i>service by mail ok</i> c. Maternal grandparents – <i>service by mail ok</i>
	Father: DAMION ROSS – <i>Consent & Waiver of Notice filed 12/09/15</i>	
Cont. from	Mother: ERIKA JONES – <i>served by mail on 01/11/16</i>	
<input type="checkbox"/> Aff.Sub.Wit.	Paternal grandfather: NOT LISTED	
<input checked="" type="checkbox"/> Verified	Maternal grandparents: NOT LISTED	
<input type="checkbox"/> Inventory	Petitioner states [see file for details].	
<input type="checkbox"/> PTC	Court Investigator Dina Calvillo filed a report on 01/22/16.	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail w/		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv. x		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 01/22/16
		Updates:
		Recommendation:
		File 23- Ross

24 Beatrice Quintana (Def. Succ) Case No. 15CEPR01149

Petitioner Quintana, Hector (Pro Per – Spouse)
 Petitioner Quintana, Bobby (Pro Per – Son)
 Petitioner Quintana, Hector, III (Pro Per – Son)
 Petitioner Quintana, Paul (Pro Per – Son)
 Petitioner Quintana, Arthur (Pro Per – Son)
 Petitioner Perez, Tommy (Pro Per)

Petition to Determine Succession to Real Property

DOD: 11/23/1998	HECTOR QUINTANA , spouse, BOBBY QUINTANA , son, HECTOR QUINTANA III , son, PAUL QUINTANA , son, and TOMMY PEREZ are petitioners.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>The deficiencies with the pleadings include, but are not limited to, the following:</p> <ol style="list-style-type: none"> 1. Need Inventory and Appraisal completed by the Probate Referee. 2. Petitioner, Tommy Perez, is not listed on Attachment 14 and it is unclear what his relationship is to the Decedent. 3. #9a(7) of the petition indicates that there is issue of a predeceased child. Pursuant to Local Rule 7.1D the name and date of death of the deceased child is required and their issue must be listed on attachment 14. If Tommy Perez is the issue of the predeceased child then he must be listed on attachment 14. 4. Calculation is incorrect. If decedent owned a 1/3rd interest in the estate then pursuant to intestate succession the spouse would be entitled to 1/9th interest and the children would share 2/9th interest in the real property. 5. Need new order with correct interest in real property.
Cont. from	40 days since DOD	
Aff.Sub.Wit.	No other proceedings	
Verified	I&A – NEED	
Inventory	X	
PTC	Decedent died intestate	
Not.Cred.	Petitioners request Court determination that decedent's 1/3 interest in real property located at 2502 Thompson Selma, Ca. pass 1/2 to Hector Quintana Sr., 1/8 to Bobby Quintana, 1/8 to Hector Quintana III, 1/8 to Paul Quintana, 1/8 to Arthur Quintana.	
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w/	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 01/25/2016
		Updates:
		Recommendation:
		File 24- Quintana

Petition to Determine Succession to Real Property

DOD: 9/29/15		<p>KAREN L. SALDATE, Daughter, is Petitioner.</p> <p>40 days since DOD</p> <p>No other proceedings</p> <p>I&A: \$135,000.00 (real property located at 4135 E. Garland in Fresno)</p> <p>Decedent died intestate</p> <p>Petitioner requests Court determination that the decedent's 100% interest in the real property passes 100% to her, Karen L. Saldate, a married woman as her sole and separate property.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 1/22/16	
			Updates:	
			Recommendation: SUBMITTED	
			File 25- Kemmer	

Petition to Determine Succession to Real Property

DOD: 4/6/15		<p>REBECCA WYATT, BRIAN BLANCHARD, and STACEY TINDLE, Daughter and Sons, are Petitioners.</p> <p>40 days since DOD</p> <p>No other proceedings</p> <p>I&A: \$95,000.00 (real property located at 3035 W. Alamos in Fresno)</p> <p>Decedent died intestate</p> <p>Petitioners request Court determination that the decedent's 100% interest in the real property passes to Petitioners in one-third undivided interests each.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 1/22/16	
			Updates:	
			Recommendation: SUBMITTED	
			File 26- Blanchard	

**27A The A. James Doyle, Jr., Trust Dated 4/19/04, Case No. 15CEPR01158
as amended and restated on 5/14/14**

Attorney Burnside, Leigh W. (for Petitioners DeeAnn Doyle Summers and John Doyle)

Petition for Order Compelling Former Co-Trustees to Account and Report

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Concurrently with the filing of this petition on 11/24/15, Petitioners also filed an Ex Parte Petition for Appointment of Successor Trustee. On 11/30/15, the Court appointed the Fresno County Public Guardian as Temporary Successor Trustee. On 12/10/15, the Court appointed MARION AUSTIN of Central Valley Fiduciary Services, Inc., as Successor Trustee. A status hearing re that appointment is Page B of this calendar.</p> <p>Note: There are two related matters:</p> <ul style="list-style-type: none"> • 15CEPR01070 (Conservatorship) (Public Guardian was appointed Conservator of the Person and Estate on 12/10/15) • 15CEPR01071 (Durable POA) (Upcoming hearing 2/4/16 for status re accounting) 	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 1/22/16	
			Updates:	
			Recommendation:	
			File 27A- Doyle	

27A

**27B The A. James Doyle, Jr., Trust Dated 4/19/04, Case No. 15CEPR01158
as amended and restated on 5/14/14**

Attorney Burnside, Leigh W. (for Petitioners DeeAnn Doyle Summers and John Doyle)

Probate Status Hearing

	DEEANN DOYLE SUMMERS and JOHN DOYLE filed Ex Parte Petition for Appointment of Successor Trustee, or Alternatively, Temporary Successor Trustee on 11/20/15.	NEEDS/PROBLEMS/COMMENTS:
	The petition requested that Marion Austin of Central Valley Fiduciary Services, Inc., is appointed successor trustee without bond.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC	The Court set the matter for hearing on 12/10/15.	
Not.Cred.		
Notice of Hrg	On 12/10/15, the Court granted the petition and set this status hearing for review of the proceeding.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 1/21/16
		Updates:
		Recommendation:
		File 27B- Doyle

27B

Petition for Letters of Administration; Authorization to Administer Under IAEA

Age:		NEEDS/PROBLEMS/COMMENTS:
DOD:		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		CONTINUED TO 2/23/16
		Per attorney request
		Reviewed by: skc
		Reviewed on: 1/22/16
		Updates:
		Recommendation:
		File 28- Lopez

Petitioner

Artellan, Cathy (Pro Per – Maternal Grandmother – Petitioner)

Petitioner

Artellan, Gerald (Pro Per – Maternal Step-Grandfather – Petitioner)

Petition for Appointment of Temporary Guardian of the Person

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) on: <ul style="list-style-type: none"> - Krystle L. Peralta (Mother) - Joe Anthony Rocha (Father) 	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 1/22/16	
			Updates:	
			Recommendation:	
			File 29- Peralta	

First Amended First and Final Account and Report of Executor and Petition for its Settlement for Allowance of Attorneys' Fees' and for Final Distribution

DOD: 5/29/09		DALE GEORGE MELL, Executor, is petitioner.	NEEDS/PROBLEMS/COMMENTS:	
Cont. from 010416, 011916				
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
✓	PTC			
✓	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W/
	Aff.Pub.			
✓	Sp.Ntc.			W/
	Pers.Serv.			
	Conf. Screen			
✓	Letters	1/14/13		
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
✓	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
✓	FTB Notice			
			OFF CALENDAR. Order signed 1/20/16.	
			Reviewed by: KT	
			Reviewed on: 1/21/16	
			Updates:	
			Recommendation:	
			File 30 - Mell	

31 Matthew H. Tange (Estate) Case No. 15CEPR00270

Attorney Willoughby, Hugh W (for Christopher Tange – Administrator)

Probate Status Hearing RE: Filing of the Inventory and Appraisal

DOD: 08/10/2014	<p>CHRISTOPHER TANGE, was appointed Administrator with full IAEA authority with bond set at \$150,000.00 on 05/19/2015.</p> <p>Receipt of Bond filed on 05/19/2015 in the amount of \$150,000.00.</p> <p>Letters issued on 05/29/2015</p> <p>Minute Order of 05/19/2015 set this Status Hearing for the filing of the Inventory and Appraisal.</p> <p>Status Report filed 10/08/2015 for hearing on 10/20/2015 states the sole asset of this estate consists of the decedent's intestate share of the estate of his late father, Ted Tange, as his sole heir at law. Ted Tange's estate is pending administration in this Court as Case no. 15CEPR00591. Christopher Tange is the Administrator of both estates, having been appointed in Ted Tange's estate on 07/22/2015; the undersigned is the attorney for Christopher in both matters.</p> <p>No Inventory has been filed in this estate for the reason Administrator has not yet completed an Inventory and Appraisal for the estate of the father which is believed to consist of both real and personal property of unknown values at present. Once an Inventory and Appraisal is completed in Ted Tange's (the father's) estate an accurate Inventory and Appraisal can be prepared for this estate. For the forgoing reasons, an additional 90 days is requested in order to complete and file the Inventories in both the estates.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR.</u></p> <p><u>Final Inventory and Appraisal filed 01/19/2016.</u></p> <p>1. Need Inventory and Appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Cont. from 102015, 011916		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>Reviewed by: LV</p> <p>Reviewed on: 01/22/2016</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 31 – Tange</p>	