

DOD: 4/18/2003		FLOY J. MEEKS , Administrator, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued to 2/19/14 at the request of the attorney.</p> <p>1. Steven Diebert was appointed as the probate referee for this estate. The inventory and appraisal was completed by Lawrence Sherman. The inventory and appraisal must be completed by the Fresno County Probate Referee that was appointed.</p> <p>Reviewed by: KT</p> <p>Reviewed on: 1/27/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1 – Mitchell</p>
		Accounting is waived.	
		I & A - \$115,000.00	
		POH - \$0	
Cont. from			
	Aff.Sub.Wit.		
✓	Verified	Administrator - Waives	
✓	Inventory	Attorney (statutory) - \$4,150.00	
✓	PTC		
✓	Not.Cred.		
✓	Notice of Hrg	Petitioner states the estate was fully distributed without court approval and there are no funds in the estate to pay closing expenses which will be satisfied by Floy J. Meeks outside of the assets of the estate.	
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen	Beneficiary, Roy Spears, assigned his interest in the estate to Floy J. Meeks.	
✓	Letters	10/27/04	
	Duties/Supp	Petitioner requests that the property of the estate be confirmed to her.	
	Objections		
	Video Receipt		
	CI Report		
✓	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice	N/A	

(1) Twelfth Account Current and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney

Age: 46 years	PUBLIC GUARDIAN , Conservator, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Friday, December 4, 2015 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
	Account period: 11/1/12 – 10/31/13	
	Accounting - \$1,579,734.35	
	Beginning POH - \$1,501,767.04	
	Ending POH - \$1,432,985.10	
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 checked="" type="checkbox"/> Aff.Mail W/	Conservator - \$2,545.44 (4.76 Deputy hours @ \$96/hr and 27.48 Staff hours @ \$76/hr)	
<input type="checkbox"/> Aff.Pub.	Attorney - \$1,250.00 (per Local Rule)	
<input type="checkbox"/> Sp.Ntc.	Bond fee - \$3,617.47 (o.k.)	
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters	Petitioner prays for an Order:	
<input type="checkbox"/> Duties/Supp	<ol style="list-style-type: none"> Approving, allowing and settling the twelfth account; Authorizing the conservator and attorney fees and commissions; Payment of the bond fee. 	
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 2620(C)		
<input checked="" type="checkbox"/> Order	Court Investigator Anita Morris' Report filed on 7/12/13.	
<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: KT
		Reviewed on: 1/27/14
		Updates:
		Recommendation:
		File 2 – Lopez

Atty Franco, Paul C., of (for Petitioner Mark F. Ellson, Executor)

(1) First and Final Account, Report of Executor and (2) Petition for Final Distribution and for (3) Allowance of Attorney's Fees and Costs

DOD: 8/26/2011		MARK F. ELLSON , son and Executor, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Final Inventory and Appraisal filed on 10/11/2013 is incomplete at Item 5 re: property tax certificate, as required by Probate Code § 8800(d). Need statement regarding Property Tax Certificate. (Revenue and Tax Code § 480.) Paragraph 36 of the Petition lists \$3,745.82 to be distributed to Petitioner for reimbursement. Petition contains neither a request nor any information regarding an explanation or itemization of this reimbursement to Petitioner. Need clarification of the \$3,745.82 sum listed in the proposed distribution to Petitioner. Need proposed order.
		Account period: 8/26/2011 – 10/10/2013	
		Accounting - \$104,444.40	
		Beginning POH - \$104,435.54	
		Ending POH - \$104,444.40 <i>(all cash)</i>	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Executor - \$4,133.06 <i>(statutory)</i>	
<input checked="" type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	Executor Reimb. - \$3,745.82 <i>(not explained or itemized)</i>	
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Attorney - \$4,133.06 <i>(statutory; to be divided between Klein, DeNatale, Goldner, Cooper, Rosenlieb & Kimball @ \$3,000.00; and Paul Franco @ \$1,133.06;)</i>	
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.	Costs - \$1,185.00 <i>(filing fees, publication, certified copies)</i>	
<input checked="" type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	Closing - \$2,000.00 <i>(for taxes)</i>	
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters	031512	
<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 checked="" type="checkbox"/>	FTB Notice		
		Distribution pursuant to Decedent's Will is to:	
		<ul style="list-style-type: none"> MID-LANE COMMUNITY PARTNERSHIP – \$2,000.00; FERN RIDGE FOUNDATION – \$2,000.00; ART, INC. – \$2,000.00; MARK F. ELLSON – 15% of residue consisting of \$12,664.87 cash; LESLIE ELLSON LUTH – 15% of residue consisting of \$12,664.87 cash; MARION ELLSON – 10% of residue consisting of \$8,443.25 cash; DONNA ELLSON – 10% of residue consisting of \$8,443.25 cash; DONNETTE BRABHAM – 50% of residue consisting of \$42,216.23 cash. 	
		Reviewed by: LEG	
		Reviewed on: 1/27/14	
		Updates:	
		Recommendation:	
		File 3 – Ellson	

Atty Amador, Catherine A., of Pascuzzi, Moore & Stoker (for Mike H. Smith and Jenna R. Smith, Co-Conservators of the Person)

Atty Kruthers, Heather H., of County Counsel's Office (for Public Guardian, Conservator of the Estate)
Ex Parte Application for Partial Distribution of Conservatorship Estate Following Death of Conservatee

DOD: 10/2012		<p>MICHAEL H. SMITH, SR., son, Co-Conservator of the Person, and Successor Trustee of Conservatee's living trust, is Petitioner.</p> <p>Petitioner states:</p> <ul style="list-style-type: none"> The Court appointed Petitioner and his daughter, Jenna R. Smith, as Conservators for the Person of the Conservatee, and the Public Guardian as Conservator of the Estate, and Letters issued on 7/17/2012; Since the time that the Conservatee passed away in October 2012, the Public Guardian has been struggling to collect the necessary information to complete its inventory and appraisal of the Conservatorship Estate; The Inventory and Appraisal was finally completed and submitted to the Court on 12/18/2014, nearly 14 months after Conservatee's death, listing assets totaling \$655,215.93; No petition has yet been filed to permit the distribution of Conservatee's estate to Petitioner, who is the Successor trustee of Conservatee's trust; A plan for distribution of Conservatee's share of community property assets between her heirs and her surviving spouse [Ben H. Smith, Conservatorship Case # 11CEPR00782] has yet to be developed, as it is not yet entirely clear what assets were held in joint tenancy and, thus, devolve automatically to Conservatee's surviving spouse; <p align="center">~Please see additional page~</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Page 4B is the Status Hearing Re: Accounting.</p> <p>Page 13 is the status hearing for the related matter of the Conservatorship of Ben H. Smith, surviving spouse.</p> <p>Note: Order on Ex Parte Application for Partial Distribution of Conservatorship Estate Following Death of Conservatee filed 1/14/2014 set this matter for hearing on 1/29/2014, with 15 days' notice required to all interested parties, including the Public Guardian as Conservator of the Estate. Clerk's Certificate of Mailing shows the Order was served on Attorney Amador on 1/15/2014.</p> <p>1. Need proof of service of notice to all interested parties per Order on Ex Parte Application for Partial Distribution of Conservatorship Estate Following Death of Conservatee filed 1/14/2014.</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 type="checkbox"/>	Notice of Hrg			X
<input type="checkbox"/>	Aff.Mail			X
<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			
		<p>Reviewed by: LEG</p> <p>Reviewed on: 1/27/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 4A – Smith</p>		

Petitioner states, continued:

- The parties hope to distribute Conservatee's estate in a way which permits her surviving spouse to keep the marital residence and to distribute other assets to her heirs;
- An additional goal is to distribute assets in a way which avoids joint ownership among Conservatee's surviving spouse and her other heirs; however, this plan has yet to be finalized;
- Petitioner seeks a small distribution of available cash assets from Conservatee's estate to her Trust in the amount of **\$6,500.00**;
- Petitioner and his fellow beneficiary under Conservatee's Trust have been forced to wait for more than a year for distribution of the Conservatorship estate and this has caused financial hardship for both;
- This amount is requested to allow Petitioner to pay certain bills associated with the dry cleaning business;
- An interest in this business is one of the assets in the Conservatorship estate and payment of these bills is necessary to keep the business open; otherwise, it will have to cease operations and that portion of the Conservatorship estate will become worthless;
- Petitioner believes there is or should be adequate cash available to the Conservatorship estate to make the requested distribution;
- Petitioner believes that all claims on the Conservatorship estate have been submitted and paid by the Public Guardian, including all claims for Conservatee's residential nursing care facility, medical bills, and her final expenses.

Petitioner requests that the Conservator of the Estate be ordered to disburse the sum of \$6,500.00 to Petitioner Michael H. Smith as Successor Trustee of the Conservatee's Trust.

Note: *Corrected Final Inventory and Appraisal* filed on 12/18/2013 appears to indicate that the estate contains ~**\$27,000.00** in bank accounts (cash) of the **\$655,215.93**.

Note: *Order on Petition for Attorney Fees* filed 3/26/2013 finds **\$9,746.50** was granted for attorney fees to Attorney Amador for legal services rendered to Petitioners from 3/22/2012 through 1/14/2013. Minute Order dated 3/22/2013 states the Court orders the fees to come out of Ms. Smith's Conservatorship estate.

Note: Proposed order finds that "the requested distribution is small enough that there is no danger it will interfere with appropriate distribution to other heirs or persons entitled to possession of assets within the Conservatorship Estate following the death of Conservatee."

Declaration of Catherine A. Amador in Support of Ex Parte Application for Partial Distribution of Conservatorship Estate Following Death of Conservatee filed 1/14/2013 sets forth Attorney Amador's efforts to contact Attorney Jaech, Attorney Motsenbocker, Attorney Krbechek, and Attorney Kruthers regarding the Petitioner's request for partial distribution.

Atty Kruthers, Heather H., of County Counsel's Office (for Public Guardian, Conservator of the Estate)

Status Hearing Re: Accounting

DOD: 10/2012		<p>PUBLIC GUARDIAN was appointed Conservator of the Estate on 6/26/2012.</p> <p><i>Corrected Final Inventory and Appraisal</i> was filed on 12/18/2013 showing an estate value of \$655,215.93.</p> <p>Minute Order dated 10/29/2013 from the status hearing regarding filing the inventory and appraisal set this <i>Status Hearing Re: Accounting</i> on 1/29/2014.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need first and/or final account of the conservatorship estate, or verified status report and proof of service of notice of the status hearing pursuant to Local Rule 7.5(B).</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	X		
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: LEG	
		Reviewed on: 1/27/14	
		Updates:	
		Recommendation:	
		File 4B – Smith	

(1) First and Final Account and Report of Conservator; (2) Petition for Allowance of Compensation to Conservator and his Attorney

		PUBLIC GUARDIAN , Temporary Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Teri Severin and Vance Severin were appointed conservators on 9/25/12.	
Cont. from		Account period: 7/5/12 – 10/24/12	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory	Accounting - \$26,949.32	
	PTC	Beginning POH - \$0	
	Not.Cred.	Ending POH - \$5,951.34	
✓	Notice of Hrg	Conservator - \$8,712.16 (80.46 Deputy hours @ \$96/hr and 13.00 Staff hours @ \$76/hr)	
✓	Aff.Mail	W/	
	Aff.Pub.	Attorney - \$1,250.00 (per Local Rule)	
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen	Bond fee - \$25.00 (o.k.)	
	Letters		
	Duties/Supp	Court fees - \$539.00 (filing fee and certified copies)	
	Objections		
	Video Receipt	Petitioner request that due to the insufficiency of the estate to pay the fees and commissions that a lien be imposed upon the estate for any unpaid balances of the authorized fees and commissions.	
	CI Report		
✓	9202		
✓	Order		
	Aff. Posting	Petitioner prays for an Order:	
	Status Rpt	4. Approving, allowing and settling the first and final account.	
	UCCJEA	5. Authorizing the conservator and attorney fees and commissions	
	Citation	6. Payment of the bond fee	
	FTB Notice	7. Authorize petitioner to impose a lien on the estate for any unpaid balances of authorized fees and commissions	
			Reviewed by: KT
			Reviewed on: 1/27/14
			Updates:
			Recommendation:
			File 5 – Salzman

Report of Sale and Petition for Order Confirming Sale of Real Property

Age:	KAREN WILLIAMS is Administrator/petitioner.		NEEDS/PROBLEMS/COMMENTS: 1. Need Affidavit of Publication. 2. #4a of the petition does not state the manner of vesting title. 3. Need blocking order. Note: If the petition is granted, status hearings will be set as follows: <ul style="list-style-type: none"> Friday, February 28, 2014 at 9:00 a.m. in Department 303, for the filing of the receipt for blocked account. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.
DOD:			
Cont. from	Sale price	- \$120,000.00	
	Overbid	- \$126,500.00	
	Reappraisal	- \$130,000.00	
<input type="checkbox"/> Aff.Sub.Wit.	Property	- 5217 E. Blossom Lane, Fresno	
<input checked="" type="checkbox"/> Verified	Publication	- NEED	
<input checked="" type="checkbox"/> ReAppraisal	Buyers	- Gurshakti Gill and Jaspreet Kaur	
<input type="checkbox"/> PTC	Broker	- \$7,200.00 (6% - payable to ReMax)	
<input type="checkbox"/> Not.Cred.	Proceeds of the sale will be placed into a blocked account.		
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	w/		
<input type="checkbox"/> Aff.Pub.	X		
<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			
			Reviewed by: KT
			Reviewed on: 1/27/14
			Updates:
			Recommendation:
			File 6 – Williams

Report of Sale and Petition for Order Confirming Sale and Real Property

DOD: 10/15/11	PAUL GESTIC is Executor/petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Sale price - \$296,261.70	OFF CALENDAR. Per minute order dated 1/28/14.
	Overbid - \$311,547.79	
	Reappraisal - \$245,000.00	1. The overbid was calculated incorrectly. The correct overbid is \$311,547.79
Aff.Sub.Wit.	Property - 2075 E. Eclipse, Fresno	
Verified	Publication - Fresno Bee	2. #4a of the petition does not state the manner of vesting title.
Inventory	Buyers - Jun Hawkins,	
PTC	Broker - none	
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		Reviewed by: KT
Status Rpt		Reviewed on: 1/28/14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 7 – Hawkins

Amended First and Final Report of Executrix and Petition for Its Settlement; for Allowance of Statutory Fees to Executrix and Attorney for Ordinary Services; and for Final Distribution

DOD: 12/02/12	JANA L. TERRY , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need Order.
	Account period: 12/02/12 – 10/11/13	
	Accounting - \$175,000.00	
	Beginning POH - \$175,000.00	
	Ending POH - \$141,040.22	
Cont. from	Executor (statutory) - \$5,560.00	
<input type="checkbox"/> Aff.Sub.Wit.	Executor costs - \$1,230.00 (filing fees, publication, certified copies, probate referee)	
<input checked="" type="checkbox"/> Verified	Attorney (statutory) - \$5,560.00	
<input checked="" type="checkbox"/> Inventory	Costs - \$460.00 (certified copies, filing fees)	
<input checked="" type="checkbox"/> PTC	Distribution, pursuant to decedent's will, is to:	
<input checked="" type="checkbox"/> Not.Cred.	Jana L. Terry, Trustee of the Louise B. Hoak Trust - \$128,230.22	
<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 05/31/13		
<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 checked="" type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 01/27/14
		Updates:
		Recommendation:
		File 8 – Hoak

(1) First and Final Report of Administrator on Waiver of Account and (2) Petition for Allowance of Statutory Attorney's Fees and (3) for Final Distribution

DOD: 6-9-13	JANINE WALSH , Spouse and Administrator with Full IAEA without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Accounting is waived.	
	I&A: \$512,926.99	
Aff.Sub.Wit.	POH: \$27,684.00 cash plus real property, promissory note, silver collection	
✓ Verified	Administrator (Statutory): Waived	
✓ Inventory	Attorney (Statutory): \$12,000.00 (less than statutory)	
✓ PTC	Costs: \$1,976.08 (filing, publication, appraisal, certified copies, recording)	
✓ Not.Cred.	Distribution pursuant to intestate succession:	
✓ Notice of Hrg	Janine Walsh: \$6,353.96 cash plus a one-half undivided interest in certain real and personal property, promissory note	
✓ Aff.Mail	Virginie H. Walsh: \$6,353.96 cash plus a one-half undivided interest in certain real and personal property, promissory note	
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: 1-27-14
		Updates:
		Recommendation: SUBMITTED
		File 10 – Walsh

		CATHERINE B. FLAMBURES , Settlor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need order.
		Petitioner/Settlor/Trustor states the named beneficiaries of the trust and the Settlor have all agreed to terminate the trust and distribute all assets to the Settlor.	
	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		
		Petitioner created the irrevocable trust on 2-5-11. Pursuant to the terms of the trust, Harry Arthur Flambures was named Initial Trustee. Harry served as trustee until May 2012, when he resigned and Melanie Hope Flambures was appointed.	
		The only assets of the trust are one residential real property and ten dollars cash.	
		The trust states that while Petitioner is alive, the three beneficiaries are Laurie Flambures Salvano, Melanie Hope Flambures, and Harry Arthur Flambures (the Named Beneficiaries). Specifically, the trust's language distributes lifetime estates to the Named Beneficiaries consecutively, after the Trustor's death, with the provision that the last living Named Beneficiary as well as that person's "heirs by right of representation" will take free and clear all the trust's remaining assets and the trust will be terminated.	
		At the time Petitioner executed the trust, she wished to create the irrevocable trust for tax benefits and to ensure a life estate in her residence to each Named Beneficiary. At this time, however, Petitioner wishes that the trust be terminated and the assets be distributed to her. The Named Beneficiaries are each in agreement with Petitioner's wish to terminate the trust and each has signed a consent.	
		Petitioner states the Court may limit the class whose consent is needed to those likely to receive distribution of trust assets with reference to Probate Code § 15404(c) and additional authority. As such, Petitioner requests an order that the class of beneficiaries to which consent is needed to terminate the trust be limited to the Named Beneficiaries.	
			Reviewed by: skc
			Reviewed on: 1-28-14
			Updates:
			Recommendation:
			File 11 – Flambures

	PUBLIC ADMINISTRATOR was appointed on the court's own motion as Successor Administrator on 7/31/13.	NEEDS/PROBLEMS/COMMENTS:
	JULIE FULCHER , ex-wife, was appointed as Administrator with Full IAEA without bond on 8/23/11. Ms. Fulcher was removed and the Public Administrator appointed on 7/31/13.	
	The intestate heirs are the Decedent's two children, one of whom is a minor.	
Cont. from 102913	Status Report of the Public Administrator filed on 1/3/14 states the Public Administrator has filed a reappraisal of the real property, and a Notice of Proposed Action. The real property was going through escrow. The property may need to be sold by short sale due to the liens on the property. The Public Administrator is working with Wells Fargo on the sale of the house and is currently reviewing the offer submitted by them. Because it is a short sale, Wells Fargo needs additional time to review the submitted offer.	
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: KT
		Reviewed on: 1/27/14
		Updates:
		Recommendation:
		File 12 – Fulcher

Atty Motsenbocker, G. L., sole practitioner (for Public Guardian, Conservator)
 Atty Jaech, Jeffrey A. (for Conservatee)
 Atty Amador, Catherine A. (for Michael H. Smith, Sr. – son)

Status Hearing Re: Filing of the Inventory and Appraisal

<table border="1"> <tr><td>Age: 86 years</td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td>Cont. from 061813, 081613, 092013, 092713, 102913</td></tr> <tr><td>Aff.Sub.Wit.</td></tr> <tr><td>✓ Verified</td></tr> <tr><td>Inventory</td></tr> <tr><td>PTC</td></tr> <tr><td>Not.Cred.</td></tr> <tr><td>Notice of Hrg</td></tr> <tr><td>✓ Aff.Mail</td></tr> <tr><td>Aff.Pub.</td></tr> <tr><td>Sp.Ntc.</td></tr> <tr><td>Pers.Serv.</td></tr> <tr><td>Conf. Screen</td></tr> <tr><td>Letters</td></tr> <tr><td>Duties/Supp</td></tr> <tr><td>Objections</td></tr> <tr><td>Video Receipt</td></tr> <tr><td>CI Report</td></tr> <tr><td>9202</td></tr> <tr><td>Order</td></tr> <tr><td>Aff. Posting</td></tr> <tr><td>✓ Status Rpt</td></tr> <tr><td>UCCJEA</td></tr> <tr><td>Citation</td></tr> <tr><td>FTB Notice</td></tr> </table>	Age: 86 years					Cont. from 061813, 081613, 092013, 092713, 102913	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>PUBLIC GUARDIAN was appointed Conservator of the Person and Estate on 1/13/2013.</p> <p><i>Inventory & Appraisal, Partial No. 1</i> filed 5/14/2013 shows a partial estate value of \$0.00 consisting of a 50% interest in JBM Enterprises Inc., Paradise Dry Cleaners.</p> <p>Status Report Re: Filing of Inventory and Appraisal filed by Attorney Motsenbocker on 1/27/2014 states:</p> <ul style="list-style-type: none"> The Conservator has completed the inventory of the Conservatorship estate and the original inventory has been sent to Steven D. Diebert, the Probate Referee, for appraisal; As soon as his client has received the completed appraisal, it will be filed with this Court. <p>Previous Status Reports for Background:</p> <ul style="list-style-type: none"> Status Report filed 09/26/2013 states that delays have occurred due to problems gathering and sorting out data; the attorneys for the various parties have been working diligently to agree and submit the necessary information to the Conservator, but due to some confusion as to "who was supposed to do what" the completion of the Inventory has been sporadic. Status Conference Statement filed 5/31/2013 by Michael H. Smith, Sr. states the parties are currently awaiting the completion of the Inventory & Appraisal by the Public Guardian; Conservatee's grandson, Michael H. Smith, Jr. ("Butch") has failed to provide certain bank account records required by the Public Guardian for determining the use of certain funds belonging to Conservatee which were distributed to Butch for the benefit of the Conservatee. The Conservator's inability to obtain these records is preventing them from completing the Inventory & Appraisal; once the Inventory & Appraisal is complete, the parties need to collaborate to divide the community estate belonging to Conservatee and his deceased wife, so that her portion of the estate can be distributed according to her estate plan. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 10/29/2013.</u></p> <table border="1"> <tr><td>Reviewed by: JF / LEG</td></tr> <tr><td>Reviewed on: 1/27/14</td></tr> <tr><td>Updates:</td></tr> <tr><td>Recommendation:</td></tr> <tr><td>File 13 – Smith</td></tr> </table>	Reviewed by: JF / LEG	Reviewed on: 1/27/14	Updates:	Recommendation:	File 13 – Smith
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Declaration filed 12-30-13 by Julia G. Coyle states that she does not have an issue with the conservatorship petition, but believes that the fact that it is for her estate only shows a lack of concern for their mother and concern only for her money, or a lack of wanting the responsibility of caring for her. Julia states her main concern is for their mother's care. The declaration states that if you look up psychopath and narcissistic in the dictionary, you will find a description of Cynthia G. Thomas. Due to Cynthia being one of the conservators, the Julia states she must remove herself from any care of their mother. Cynthia is verbally and mentally abusive and Julia will not subject herself to Cynthia's abuse. It breaks her heart that she will have no control over the abuse their mother will receive.

The declaration states that it has not been easy caring for their parents, and that since their father's death, the only thing Julia asked of Cynthia or Pamela was that someone relieve her so that she could go to church on Sundays. She hasn't been able to attend church since March. Neither has offered to relieve her so that she can do anything for herself.

The declaration disagrees with the petitioner's statement that she only feeds her mother fast food and describes their typical situation. Julia Coyle states she does not have issue with the permanent conservatorship, estate or person. She will continue to make payments on the credit cards that her parents allowed her to use. She would ask the Court for a minimum of six (6) weeks to move out. She had planned to be out by 12-31-13, but was in an accident on 12-4-13 and was ordered not to lift or do anything strenuous. She also asks that the conservators not cut her out of their mother's life, and allow her to visit and take her to her home from time to time.

The Declaration states that Julia Coyle does not want any part of the house, and their mother may consider the \$7,000 she put down on the house, \$1,000 closing costs, and monthly monies as well as \$5,000 twice, towards any of her alleged wrongdoing. She will, however, need to take the furniture that she purchased including the washer and dryer. She is moving with a friend at this time, but will need to take them later.

Court Investigator Julie Negrete's report filed 01/22/2014.

Petition for Visitation

Age: 14		JOHN SCOTT CHANDLER , father, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Proof of service of the Notice of Hearing was signed by the petitioner. Someone other than the petitioner is required to serve all necessary parties. 2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Teri Nelson (Guardian) • Trisha Nelson Chandler (Mother) • Thomas W. Chandler (Paternal Grandfather) • Sandy Chandler (Paternal Grandmother)
		TERRI NELSON , maternal grandmother, was appointed guardianship on 12/04/2012.	
Cont. from		Mother: TRISHA NELSON CHANDLER	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Paternal Grandfather: Thomas W. Chandler Paternal Grandmother: Sandy Chandler	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	Maternal Grandfather: Larry Nelson, Deceased	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Petitioner states: he is incarcerated in Susanville, California Correctional Center and requests that a hearing be set for visitation. He states that the guardian has health conditions that are making it impossible for the petitioner and the child to have visits. Petitioner is asking that he be granted visitation, that it be documented by the court and would like to ask for a letterhead addressed to CDC so that he can present it with a petition for a hardship transfer closer to home so that he can continue to stay in touch and close to the child.	
<input checked="" 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	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: 01/27/2014			
Updates:			
Recommendation:			
File 15 – Chandler			

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

Age: 30	<u>NO TEMPORARY REQUESTED</u>		NEEDS/PROBLEMS/COMMENTS: Court Investigator Advised Rights on 01/15/2014. Voting Rights Affected Need Minute Order. 1. Medical consent powers are not requested at #1g of the Petition but are requested at #9, therefore it is unclear if medical consent is requested. 2. Need Capacity Declaration. 3. Need proof of service at least (30) days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Conservator for: <ul style="list-style-type: none"> • Central Valley Regional Center per Probate Code §1822(e). 4. Need Video Receipt for conservator pursuant to Local Rule 7.15.8(A).
Cont. from			
	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	x	
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	Citation		
	FTB Notice		

TRINIDAD CHAVEZ MOTA, mother, is Petitioner and requests appointment as Conservator of the Person with medical consent powers.

Capacity Declaration – **NEED**

Voting Rights Affected

Petitioner states: Conservatee is severely disabled, he cannot walk or talk and needs daily care for all his daily routine. Petitioner currently provides a stable home providing for his emotional and daily needs.

Court Investigator JoAnn Morris' report filed on 01/17/2014.

Reviewed by: LV

Reviewed on: 01/27/2014

Updates:

Recommendation:

File 16 – Llamas

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Age: 22 days old		<p align="center"><u>TEMPORARY GRANTED EX PARTE EXPIRES</u> <u>01/29/2014</u></p> <p align="center"><u>GENERAL HEARING 03/03/2014</u></p> <p>JOSE ANTONIO RIVERA and ESTHELA CORRAL, maternal grandparents are petitioners.</p> <p>Father: UNKNOWN</p> <p>Mother: NAYELI RIVERA, consents and waives notice</p> <p>Paternal Grandparents: Unknown</p> <p>Petitioners state: the mother of the minor, their daughter, has been diagnosed with Bipolar and Schizoaffective Disorder. She hears voices and has hallucinations. She has a history of substance use. During her pregnancy, the mother would make marks on her stomach and make statements like "I can hit my baby if I want to, he's my baby." Petitioners allege that the mother has been aggressive towards them in the past. Petitioners state that while the mother was pregnant she would leave the house in the middle of the night and go to 7-11 where she would use drugs and be with men. As a result of her medical condition the petitioners believe the child would not be safe in the mother's care.</p> <p>Petitioners request to be excused from noticing the father as the mother does not know who the biological father of the child is.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Temporary Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Father (Unknown) – Unless the Court dispenses with notice 	
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 type="checkbox"/>	Notice of Hrg			x
<input type="checkbox"/>	Aff.Mail			
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<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			x
<input checked="" type="checkbox"/>	Conf. Screen			
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<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p>Reviewed by: LV</p> <p>Reviewed on: 01/28/2014</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 17 – Rivera</p>		

Age: 6	<u>GENERAL HEARING 03/19/14</u>		<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary 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. Alfred Ruiz, III (father) b. Tamy Callison (mother)
	<p>MICAELA PRINCE, paternal grandmother, is Petitioner.</p>		
	<p>Father: ALFRED RUIZ, III – <i>currently incarcerated</i></p>		
Cont. from	<p>Mother: TAMY CALLISON</p>		
Aff.Sub.Wit.	<p>Paternal grandfather: ALFRED RUIZ, JF.</p>		
✓ Verified	<p>Maternal grandparents: UNKNOWN</p>		
Inventory	<p>Petitioner states that guardianship is necessary because Mia's father is incarcerated and her mother is homeless, moving place to place and abusing drugs.</p>		
PTC			
Not.Cred.			
Notice of Hrg	x		
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.	x		
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
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Video Receipt			
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Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
			<p>Reviewed by: JF</p>
			<p>Reviewed on: 01/28/14</p>
			<p>Updates:</p>
			<p>Recommendation:</p>
			<p>File 18 – Ruiz</p>