

(1) First Account and Report of Successor Trustee and (2) Petition for Allowance of Trustee Fees and Attorney Fees

Age: 16 years	MARK E. OLSON , successor Trustee (Private Professional Fiduciary), is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 07/31/10 – 07/31/12	1. Property on hand shows that the trust owns a 2008 Ford Econoline E-250 Van. Automobile Expense shows varying monthly charges from 11/11 – 05/12 for a total of \$16,830.60 for "Van Rental". It is unclear why the trust rented a van when it owned a van. The Court may require more information.
Cont. from	Accounting - \$463,686.15	2. Schedule C-2 shows a disbursement to Sawyer Air Conditioning for \$10,900.00 for a HEPA unit for the house, however this item is not shown as an asset of the Trust on the Property on Hand schedule. The Court may require more information regarding this item.
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$299,055.65	3. Petitioner is requesting total compensation of \$8,911.00 for the accounting period based on the Court's previous order authorizing \$350/month to the Trustee. Based on the \$350/month the compensation to the Trustee for the 24 month accounting period would be \$8,400.00 not \$8,911.00. Further Schedule C-3 of the accounting reflects disbursements to Mark Olson in varying amounts rather than even monthly payments of \$350.00. The Court may require more information.
<input checked="" type="checkbox"/> Verified	Ending POH - \$324,340.49	4. Schedule C-5 reflects reimbursements to Rafael Bustos for various amounts for mileage, vacation expenses, mariachi, 15 th birthday party, clothing, outings, etc. The Court may require more information regarding these reimbursements.
<input type="checkbox"/> Inventory	Trustee - \$8,911.00 (\$7,799.00 has already been paid per Court order allowing compensation at \$350.00/month. Trustee requests approval for the remaining unpaid portion of \$511.00)	5. Attorney's request for fees and costs includes costs in the amount of \$150.36 for postage, photocopies and faxes; however, these costs are considered by the Court as part of the cost of doing business pursuant to Local Rule 7.17B.
<input type="checkbox"/> PTC	Attorney - \$5,112.86 (per itemization and declaration for total fees in the amount of \$4,962.50 consisting of 18.9 hours broken down at .50 hr. @ \$175.00/hr., 7.30 hr. @ \$200.00/hr., 9.40 hr. @ \$300.00/hr., and 1.70 hr. @ \$350.00/hr. plus costs in the amount of \$150.36 for postage, photocopies and faxes)	
<input type="checkbox"/> Not.Cred.	Petitioner prays for an Order:	
<input checked="" type="checkbox"/> Notice of Hrg	1. Settling and allowing the first account as filed;	
<input checked="" type="checkbox"/> Aff.Mail w/	2. Ratifying, confirming, and approving all of the acts and transactions of Petitioner as trustee;	
<input type="checkbox"/> Aff.Pub.	3. Allowing reasonable compensation to Petitioner for ordinary services rendered as trustee, in the total amount of \$8,911.00 for the period 07/31/10 – 07/31/12, of which \$511.00 remains unpaid to Petitioner; and	
<input type="checkbox"/> Sp.Ntc.	4. Authorizing and directing trustee to pay Robert T. Haden Professional Corporation, the sum of \$5,112.86 from the trust estate as fees for services rendered from 09/01/10 – 11/20/12.	
<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		Reviewed by: JF
<input type="checkbox"/> Status Rpt		Reviewed on: 01/24/12
<input type="checkbox"/> UCCJEA		Updates:
<input type="checkbox"/> Citation		Recommendation:
<input type="checkbox"/> FTB Notice		File 1 - Bustos

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

(1) Twelfth and Final Account and Report of Successor Conservator; (2) Petition for Allowance of Compensation to Successor Conservator and Attorney; (3) and Termination of Conservatorship of the Estate [Prob. C. 1861; 2620; 2623; 2630; 2942]

Age: 60 years	PUBLIC GUARDIAN , Successor Conservator of the Person and Estate, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		1. <i>Petition</i> does not indicate a disposition for the cash estate asset consisting of Pooled Pre-Need CD valued at \$1,500.84 following termination of the conservatorship estate.
		2. <i>Petition</i> does not indicate a plan for nor request distribution to the Conservatee of the non-cash estate asset consisting of bedroom furniture valued at \$651.89 following termination of the conservatorship estate.
		Note: Proof of Service by Mail filed 1/2/2013 shows notice was sent to three half-siblings of the Conservatee, but was not sent to PATSY PICHARDO , step-sister, mentioned in the <i>CI Report</i> filed 2/9/2011. Court may require notice to be sent to this step-sister of the Conservatee.
		Reviewed by: LEG
		Reviewed on: 1/24/13
		Updates:
		Recommendation:
		File 2 - Moreno
Account period: 11/1/2010 – 10/19/2012	Accounting - \$47,721.76	
	Beginning POH - \$32,979.83	
	Ending POH - \$ 1,913.66	
	(\$1,261.77 is cash)	
Cont. from	Conservator - \$2,642.56	
Aff.Sub.Wit.	(14.86 Deputy hours @ \$96/hr and 16.00 Staff hours @ \$76/hr)	
<input checked="" type="checkbox"/> Verified	Attorney - \$1,250.00	
Inventory	(less than \$2,500.00 per Local Rule)	
PTC	Bond fee - \$50.00 (OK)	
Not.Cred.	Petitioner requests:	
<input checked="" type="checkbox"/> Notice of Hrg	<ul style="list-style-type: none"> The Conservatorship of the Estate be terminated, as it is no longer necessary based upon the fact that during the period of accounting, the estate's investment account became depleted, and the Conservatee was placed on Medi-Cal; and Due to the insufficiency of the estate, a lien be imposed against the estate for any unpaid balance of authorized fees and commissions. 	
<input checked="" type="checkbox"/> Aff.Mail W /		
Aff.Pub.	~Please see additional page~	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/S		
Objections		
Video Receipt		
<input checked="" type="checkbox"/> CI Report		
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Petitioner prays for an Order:

1. Finding there is no longer a need for conservatorship of the estate;
2. Terminating conservatorship of the estate;
3. Approving, allowing and settling the Twelfth and Final Account;
4. Authorizing the conservator and attorney fees and commissions;
5. Authorizing payment of the bond fee.

Court Investigator Jo Ann Morris's Report was filed on 2/9/2011 and recommends the conservatorship of the person and estate continue.

(1) Third Account and Report of Conservator of the Estate and (2) Petition for Allowance of Attorney Fees

Age: 59 years	JOHN COLFER , Conservator/spouse, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Based on the property on hand and income for one year, bond should be increased to \$97,898.00 Need care facility statements pursuant to Probate Code §2620(c)(5) Disbursement schedule shows payments of \$1,219.25 for bedroom furniture however bedroom furniture is not listed on the property on hand schedule. Disbursement schedule shows payments for "repair of Marketta's car" and other disbursements for auto related expenses however there is no automobiles listed on the property on hand schedule. <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Friday, January 9, 2015 at 9:00 a.m. in Department 303, for the filing of the fourth account. <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: 8/1/10 – 10/31/12	
Cont. from	Accounting - \$292,006.31	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH- \$253,909.02	
<input checked="" type="checkbox"/> Verified	Ending POH - \$253,003.52	
<input type="checkbox"/> Inventory	Conservator - not requested	
<input type="checkbox"/> PTC	Attorney - \$2,500.00 (per Local Rule)	
<input type="checkbox"/> Not.Cred.	Current bond is \$85,000.00	
<input checked="" type="checkbox"/> Notice of Hrg	Petitioner states upon his appointment as conservator of the estate, Petitioner agreed to contribute ¼ of the family's living expenses, not to exceed \$1,000.00 while ¾ of the family's living expenses were paid from the income and assets of the conservatee. At the end of the second accounting the Petitioner was on disability due to a work related injury. Then because of the poor economy he worked only sporadically. The conservator paid expenses as he was able during the account period. However, the conservatorship paid some of the expenses Mr. Colfer had been previously paying. Mr. Colfer now has a full-time, long term employment and intends to resume his contributions from his own salary.	
<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 checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 2620(c)	X	
<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		
	Petitioner prays for an Order:	
	<ol style="list-style-type: none"> Approving, allowing and settling the third account. Authorizing the attorney fees 	
	Court Investigator JoAnn Morris' Report filed on 10/11/12	
Reviewed by: KT		
Reviewed on: 1/24/13		
Updates:		
Recommendation:		
File 3 - Erwin		

(1) Eleventh Account Current and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney [Prob. C. 2620; 2623; 2942]

Age: 45 years	PUBLIC GUARDIAN , Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Note: If the petition is granted, status hearings will be set as follows: <ul style="list-style-type: none"> Friday, January 3, 2014 at 9:00 a.m. in Department 303, for the filing of the fourth 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.
	Account period: 11/1/11 – 10/31/12	
	Accounting - \$1,652,410.14	
Cont. from	Beginning POH- \$1,577,110.15	
<input type="checkbox"/> Aff.Sub.Wit.	Ending POH - \$1,501,767.04	
<input checked="" type="checkbox"/> Verified	Conservator - \$3,050.52 (6.96 Deputy hours @ \$96/hr and 8.80 Staff hours @ \$76/hr)	
<input type="checkbox"/> Inventory	Attorney - \$1,250.00 (per Local Rule)	
<input type="checkbox"/> PTC	Bond fee - \$3,929.42 (o.k.)	
<input type="checkbox"/> Not.Cred.	Petitioner prays for an Order:	
<input checked="" type="checkbox"/> Notice of Hrg	3. Approving, allowing and settling the eleventh account.	
<input checked="" type="checkbox"/> Aff.Mail	4. Authorizing the conservator and attorney fees and commissions	
<input type="checkbox"/> Aff.Pub.	5. Payment of the bond fee	
<input type="checkbox"/> Sp.Ntc.	Court Investigator JoAnn Morris' Report filed on 6/13/12.	
<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: 1/24/13
		Updates:
		Recommendation:
		File 4 - Lopez

(1) Third Account Current and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney [Prob. C. 2620; 2623; 2640; 2942]

Age: 74 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, January 9, 2015 at 9:00 a.m. in Department 303, for the filing of the fourth account. <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> <p>Court Investigator's biennial review was due September 2012.</p>
	Account period: 10/26/10 – 10/25/12		
	Accounting	- \$87,473.93	
	Beginning POH	- \$29,332.26	
	Ending POH	- \$12,061.06	
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory	Conservator - \$1,336.96	
	PTC	(6.96 Deputy hours @ \$96/hr and 8.80 Staff hours @ \$76/hr)	
	Not.Cred.		
✓	Notice of Hrg	Attorney - \$2,500.00 (per Local Rule)	
✓	Aff.Mail	W/	
	Aff.Pub.	Bond fee - \$203.50 (o.k.)	
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen	Petitioner prays for an Order:	
	Letters	6. Approving, allowing and settling the third account.	
	Duties/Supp	7. Authorizing the conservator and attorney fees and commissions	
	Objections	8. Payment of the bond fee	
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: KT
			Reviewed on: 1/14/13
			Updates:
			Recommendation:
			File 5 – Barquet

(1) Second and Final Account and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator And Attorney

DOD: 8/23/12	PUBLIC GUARDIAN , Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 8/28/08 – 8/23/12	
Cont. from	Accounting - \$24,729.67	
Aff.Sub.Wit.	Beginning POH - \$ 361.42	
<input checked="" type="checkbox"/> Verified	Ending POH - \$ 208.67	
Inventory	Subsequent account period: 8/24/12 – 10/28/12	
PTC		
Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Accounting - \$2,288.67	
<input checked="" type="checkbox"/> Aff.Mail W/	Beginning POH - \$ 208.67	
Aff.Pub.	Ending POH - \$ 278.67	
Sp.Ntc.	Conservator - \$3,125.20 (26.30 Deputy hours @ \$96/hr and 7.90 Staff hours @ \$76/hr)	
Pers.Serv.		
Conf. Screen	Attorney - \$1,250.00 (less than allowed per Local Rule)	
Letters		
Duties/Supp		
Objections	Bond fee - \$50.00 (o.k.)	
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		
<input checked="" type="checkbox"/> Order	Petitioner prays for an Order:	
Aff. Posting	9. Approving, allowing and settling the second and final account.	
Status Rpt	10. Authorizing the conservator and attorney fees and commissions	
UCCJEA	11. Payment of the bond fee	
Citation	12. Authorize petitioner to impose a lien on the estate for any unpaid balances of authorized fees and commissions	
FTB Notice		
		Reviewed by: KT
		Reviewed on: 1/24/13
		Updates:
		Recommendation:
		File 6 - Elerick

(1) Second and Final Account and Report of Conservator; (2) Petition for Allowance of Compensation to Conservator and Attorney [Prob. C. 1860; 2620; 2623; 2630; 2942]

DOD: 9/16/2012		PUBLIC GUARDIAN, Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 4/3/09 – 9/16/12	1. Records show that this conservatorship has an outstanding balance due of \$766.00 for court investigation fees incurred on 5/1/2008.
		Accounting - \$41,543.13	
		Beginning POH - \$ 2,973.93	
		Ending POH - \$ 2,879.16	
Subsequent account period: 9/17/12-10/15/12		Accounting - \$4,948.88	
		Beginning POH - \$2,879.16	
		Ending POH - \$3,491.95	
		Conservator - \$2,506.16	
		(17.16 Deputy hours @ \$96/hr and 11.30 Staff hours @ \$76/hr)	
		Attorney - \$1,250.00 (less than allowed per Local Rule)	
		Bond fee - \$87.50 (o.k.)	
		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.	
		Petitioner prays for an Order:	
		13. Approving, allowing and settling the second and final account.	
		14. Authorizing the conservator and attorney fees and commissions	
		15. Payment of the bond fee	
		16. Authorize petitioner to impose a lien on the estate for any unpaid balances of authorized fees and commissions	
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/	
<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		
			Reviewed by: KT
			Reviewed on: 1/14/13
			Updates:
			Recommendation:
			File 7 - Donovan

(1) Second and Final Account and Report of Conservator; (2) Petition for Allowance of Compensation to Conservator and Attorney; and (3) Distribution [Prob. C. 1860; 2620; 2623; 2630; 2631; 2942]

DOD: 08/03/12		PUBLIC GUARDIAN , Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 06/14/11 – 08/03/12	
Cont. from		Accounting - \$22,186.67	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$2,097.70	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$868.30	
<input type="checkbox"/>	Inventory	Subsequent account period: 08/04/12 – 09/07/12	
<input type="checkbox"/>	PTC	Accounting - \$4,927.72	
<input type="checkbox"/>	Not.Cred.	Beginning POH - \$868.30	
<input checked="" type="checkbox"/>	Notice of Hrg	Ending POH - \$4,927.72	
<input checked="" type="checkbox"/>	Aff.Mail w/	Conservator - \$1,276.72 (8.50	
<input type="checkbox"/>	Aff.Pub.	Staff hours @ \$76/hr. and 6.57 Deputy hours @ \$96/hr.)	
<input type="checkbox"/>	Sp.Ntc.	Attorney - \$1,250.00 (per	
<input type="checkbox"/>	Pers.Serv.	Local Rule)	
<input type="checkbox"/>	Conf. Screen	Bond Fee - \$25.00 (ok)	
<input type="checkbox"/>	Letters	Petitioner states that the conservatee died	
<input type="checkbox"/>	Duties/Supp	intestate and survived by three children.	
<input type="checkbox"/>	Objections	However, after payment of the court-ordered	
<input type="checkbox"/>	Video Receipt	fees and commissions, there will be no assets	
<input type="checkbox"/>	CI Report	remaining for distribution. Any remaining	
<input type="checkbox"/>	2620(c) n/a	property on hand will be distributed to the State	
<input checked="" type="checkbox"/>	Order	of California, Department of Health Services, to	
<input type="checkbox"/>	Aff. Posting	reimburse for Medi-Cal.	
<input type="checkbox"/>	Status Rpt	Petitioner prays for an Order:	
<input type="checkbox"/>	UCCJEA	1. Approving, allowing and settling the	
<input type="checkbox"/>	Citation	second and final account;	
<input type="checkbox"/>	FTB Notice	2. Authorizing the conservator and	
		attorney fees and commissions;	
		3. Authorizing payment of the bond fee;	
		and	
		4. Authorizing distribution of the balance of	
		property on hand to the State of	
		California.	
			Reviewed by: JF
			Reviewed on: 01/24/13
			Updates:
			Recommendation:
			File 9 - Hudson

(1) Waiver of Accounting and (2) Petition for Final Distribution and for (3) Allowance of Fees to Attorney (Prob. C. 11640, 10810)

DOD: 08/14/11		<p>DAVID MICHAEL VALLA, Administrator, is Petitioner.</p> <p>Accounting is waived.</p> <p>I & A - \$190,000.00 POH - \$190,000.00 (real property)</p> <p>Administrator - waived</p> <p>Attorney - \$4,500.00 (less than statutory, to be paid by Petitioner outside of the estate)</p> <p>Distribution, pursuant to intestate succession, is to:</p> <p>David Michael Valla - real property valued at \$190,000.00</p>	<p>NEEDS/PROBLEMS/COMMENTS:</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 type="checkbox"/>	Letters			04/17/12
<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 checked="" type="checkbox"/>	FTB Notice			
			Reviewed by: JF	
			Reviewed on: 01/24/13	
			Updates:	
			Recommendation: SUBMITTED	
			File 10 - Valla	

Petition for Order Confirming Successor Trustee [Prob. C. 17200]

Goldie DOD: 04/20/98	DORETA RUTH WHITTEN , successor Trustee, is	NEEDS/PROBLEMS/COMMENTS:
Arthur DOD: 03/25/11	Petitioner.	<u>CONTINUED FROM 11/28/12</u>
Cont. from 112812	Petitioner states:	Minute Order from 11/28/12 states:
<input type="checkbox"/> Aff.Sub.Wit.	1. The ARTHUR WILLIAM MYERS AND GOLDIE MAE MYERS JOINT REVOCABLE LIVING TRUST (the "Trust") was established under the laws of the State of Oregon on 09/14/95 with Arthur Myers & Goldie Myers as Trustors.	Counsel advises the Court that last night one of the intestate heirs contacted Attorney Joanne Sanoian. Counsel further advises that she believes there may be an objection. Counsel requests a continuance.
<input checked="" type="checkbox"/> Verified	2. When the Trust was established, Trustors owned units of Franklin California Tax-Free Income Fund, Inc. – Class I ("Franklin Fund") where were listed on Schedule A as an asset of the Trust. The Franklin Fund was serviced through an account at World Savings Bank. During the course of administration, units of Franklin California Income Fund – Class A were added to the account. The account changed hands during the bank and brokerage mergers and currently both Franklin California Income Funds are held in an account with Chase Investment Services Corporation titled, "Arthur W. Myers, Trustee of the Arthur W. Myers and Goldie May Myers Bypass Trust."	As of 01/23/13, nothing further has been filed.
<input type="checkbox"/> Inventory	3. Arthur Myers served as initial trustee and the Trustors' daughter, Petitioner Doreta Whitten, was designated to serve as successor trustee. Pursuant to section 1.7 of Article 1 of the Trust, either Trustor, acting alone, had the right to "exercise the rights of revocation, withdrawal, alteration, and amendment..." the Trust when either Trustor died or became incapacitated.	Reviewed by: JF
<input type="checkbox"/> PTC	4. After the Trustors moved from Oregon to California, the Trust was restated by a California Attorney on 10/08/97 (the "Restated Trust"). Arthur Myers remained as the initial Trustee and Petitioner remained as successor Trustee.	Reviewed on: 01/23/13
<input type="checkbox"/> Not.Cred.	5. On 04/20/98, Trustor Goldie Myers died and Arthur Myers continued to serve as Trustee.	Updates:
<input checked="" type="checkbox"/> Notice of Hrg		Recommendation:
<input checked="" type="checkbox"/> Aff.Mail w/		File 11 - Myers
<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		

Continued on Page 2

6. After the death of Goldie Myers, Arthur Myers partially funded the sub-trusts created under the Restated Trust by transferring title on the Chase Investment Services Corporation ("Chase") account to Arthur W. Myers, Trustee of the Arthur W. Myers and Goldie May (sic) Myers Bypass Trust. This account is currently active. Petitioner states that the original Restated Trust was provided to Chase for copying at the time the account was transferred to the sub-trust.
7. Arthur Myers died on 03/25/11. After his death, Petitioner began serving as the sole successor trustee of the Trust and all sub-trusts established thereunder, including the Bypass Trust.
8. As part of her administration of the Trust, Petitioner submitted an Account Registration Change Request to Chase to request that her name be put on the account as successor Trustee. Chase rejected this request on the grounds that since the original Trust document did not use the term "Bypass Trust", the change would violate their internal policy without re-submission of the Restated Trust. (Chase is apparently unable to locate the copy of the Restated Trust provided to them by Mr. Myers).
9. After Mr. Myers death, Petitioner discovered that a portion of the original Restated Trust was missing from Mr. Myer's binder of original documents. After a diligent search, Petitioner has been unable to find the missing pages and has been unable to find a complete copy. The attorney who drafted the Restated Trust, Robert Zehner, has retired and the attorney who took over his filed, Ann Herring, has been unable to locate a copy due to a crash of the firm's computerized storage system. Ms. Herring has confirmed, however, that the appointment of Doreta Ruth Whitten as successor trustee was in effect at the Trustor's death. Without submission of the complete original Restated Trust, Chase will not put Petitioner on the account as successor trustee. Chase advised Petitioner that a court order would be required.

Petitioner prays for an Order:

1. Determining that Doreta Ruth Whitten is the Successor Trustee of the Arthur William Myers and Goldie Mae Myers Joint Revocable Living Trust and all sub-trusts established thereunder, including, without limitation, the Arthur W. Myers and Goldie Mae Myers Bypass Trust; and
2. Determining that Chase Investment Services Corporation account number xxx-x9207 (formerly account number xxx-xx4471) currently held in the name of Arthur W. Myers, Trustee of the Arthur W. Myers and Goldie May Myers Bypass Trust be transferred to Doreta Ruth Whitten, Successor Trustee of the Arthur W. Myers and Goldie Mae Myers Bypass Trust.

Petition for Termination of Guardianship

Sable, 11	NATASHA VASQUEZ , mother, is Petitioner.		NEEDS/PROBLEMS/COMMENTS: 1. Need proof of service by mail of <i>Notice of Hearing</i> with a copy of the <i>Petition for Termination of Guardianship</i> at least 15 days before the hearing on: - Keith Carter (father) - Christopher Carter (paternal grandfather) - Joseph Vasquez (maternal grandfather) - Dracos Becker (brother)
Killian, 7	MARIE WESCOTT , non-relative, was appointed Guardian on 12/14/10. – <i>Served by mail on 12/08/12</i>		
Cont. from		Father: KEITH CARTER	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Paternal grandfather: CHRISTOPHER CARTER	
<input type="checkbox"/>	Inventory	Paternal grandmother: TAMERA COLLINSWORTH - <i>deceased</i>	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.	Maternal grandfather: JOSEPH VASQUEZ	
<input checked="" type="checkbox"/>	Notice of Hrg	Maternal grandmother: SHELLY FULLERTON – <i>Served by mail on 12/08/12</i>	
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.	Sibling: DRACOS BECKER (12)	
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen	Petitioner alleges that her requests to be involved with the children's schooling, therapy, doctor's visits, and regarding visitation have been ignored. She states that she going to school to be an RN, has her oldest son in her care and is able to provide for the children. She therefore requests that the guardianship be terminated.	
<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	Court Investigator Dina Calvillo filed a report on 01/22/13.	
<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: JF
			Reviewed on: 01/24/13
			Updates:
			Recommendation:
			File 12 - Carter

Jordan Age: 2	<p align="center">NO TEMPORARY REQUESTED</p> <p>RACHEL RAYENETTE RAMIREZ-RODRIGUEZ, maternal grandmother, is petitioner.</p> <p>Father: SALVADOR VILLA, Consents and Waives Notice</p> <p>Mother: JESSICA ALLEN, Consents and Waives Notice</p> <p>Paternal Grandfather: Roberto Villa, Deceased</p> <p>Paternal Grandmother: Pauline Rodriguez, Consents and Waives Notice</p> <p>Maternal Grandfather: Deceased</p> <p>Petitioner states: the parents are not stable, the mother is always relapsing and the father is not always around. Petitioner states the children need a stable and safe home.</p> <p>Court Investigator Samantha Henson's report filed 01/24/2013.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>This petition pertains only to Jordan Villa and Cindi Villa. Guardianship of Bernice Villa was granted on 01/03/2013 appointing the child's maternal aunt and her partner permanent guardians.</p> <p>1. UCCJEA does not provide the residence of the children since birth as required.</p>	
Cindi Age: 7 months			
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			n/a
<input type="checkbox"/> Aff.Mail			n/a
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			n/a
<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: LV</p> <p>Reviewed on: 01/25/2013</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13 - Villa</p>	

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

Age: 2		<u>Temporary Expires 1-30-2013</u>		<p>LUCY L. OCHOA, Paternal Grandmother, is Petitioner.</p> <p>Father: ROBERT OCHOA, Consents and Waives Notice</p> <p>Mother: VERONICA GONZALES, Declaration of Due Diligence filed 11/13/2012</p> <p>Paternal Grandfather: Reynoldo Ochoa</p> <p>Maternal Grandfather: Steven Gonzales Maternal Grandmother: Peggy Sue Jimenez</p> <p>Petitioner states the father is currently incarcerated and the mother is in and out of the child's life. She has been gone over 5½ months. Petitioner states she has cared for and supported the minor since she was born. The mother abuses drugs and has been arrested three times in the last few months.</p> <p>Declarations from various relatives in support of proposed guardian's petition filed on 01/25/2013.</p> <p>Court Investigator Jennifer Young's report filed 01/02/2013.</p> <p>Court Investigator Jennifer Young's Supplemental Report filed 01/25/2013.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 01/09/2013: Mother, Veronica Gonzales, objects to the petition. Mother is directed to meet with Court Investigator Jennifer Young forthwith.</p> <p>The following issues still remain.</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal 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 for: <ul style="list-style-type: none"> • Veronica Gonzales (Mother) 3. 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 or declaration of due diligence for: <ul style="list-style-type: none"> • Steven Gonzales (Maternal Grandfather) • Peggy Sue Jimenez (Maternal Grandmother) <p>Note: Declaration of Due Diligence filed 11/13/2012 states unable to locate mother by phone and address.</p>
Cont. from 010913					
<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	<input checked="" type="checkbox"/>			
<input type="checkbox"/>	Aff.Mail	<input checked="" type="checkbox"/>			
<input type="checkbox"/>	Aff.Pub.				
<input type="checkbox"/>	Sp.Ntc.				
<input type="checkbox"/>	Pers.Serv.	<input checked="" type="checkbox"/>			
<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: LV					
Reviewed on: 01/25/2012					
Updates: 01/29/2013					
Recommendation:					
File 14 - Ochoa					

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

Age: 18	<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS:
	DIANA GARDUQUE , mother, is Petitioner and requests appointment as Conservator of the Person with Medical Consent powers.	Voting rights affected. Need minute order.
	Declaration of Lydia Favor, M.D. – NEED COMPLETED DECLARATION	Court Investigator advised rights on 01/15/13.
Cont. from	Voting rights affected.	1. The Capacity Declaration filed 12/07/12 is incomplete. Need completed capacity declaration.
Aff.Sub.Wit.	Petitioner states that the proposed conservatee was born with a seizure disorder and developmental delays and needs constant care. Conservatorship is necessary in order to make decisions on the conservatee's behalf.	2. The Petition is incomplete at item 11. The names, residence addresses, and relationships to the proposed conservatee of all second degree relatives (parents, grandparents, children, grandchildren, and siblings) are to be listed.
✓ Verified	Court Investigator Jennifer Young filed a report on 01/22/13.	3. Need Citation and proof of personal service at least 15 days before the hearing of the <i>Citation</i> along with a <i>Notice of Hearing</i> and copy of the <i>Petition for Appointment of Probate Conservator</i> on the proposed conservatee.
Inventory		4. Need Citation and proof of personal service at least 15 days before the hearing of the <i>Citation</i> along with a <i>Notice of Hearing</i> and copy of the <i>Petition for Appointment of Probate Conservator</i> on the proposed conservatee.
PTC		5. 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 Probate Conservator</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: - All second degree relatives (to be listed in item 11 of the Petition)
Not.Cred.		6. Need Order.
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: 01/24/13
		Updates: 01/28/13
		Recommendation:
		File 15 - Garduque

Age: 16		<u>GENERAL HEARING 03/21/2013</u>		NEEDS/PROBLEMS/COMMENTS:	
		<p>SOCORRO GONZALEZ, paternal grandmother, is petitioner.</p>		<p>1. Need Notice of Hearing.</p>	
Cont. from		<p>Father: CESAR MORENO</p>		<p>2. Need proof of personal service five (5) 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:</p>	
<input type="checkbox"/>	Aff.Sub.Wit.	<p>Mother: JEANETTE GUZMAN</p>		<ul style="list-style-type: none"> • Cesar Moreno (Father) • Jeanette Guzman (Mother) • Cesar Moreno (Minor) • Samantha Moreno (Sibling) 	
<input checked="" type="checkbox"/>	Verified	<p>Paternal Grandfather: Unknown</p>		<p>3. Need Letters.</p>	
<input type="checkbox"/>	Inventory	<p>Maternal Grandfather: Juan Jose Magana</p>			
<input type="checkbox"/>	PTC	<p>Maternal Grandmother: Graciela Magana</p>			
<input type="checkbox"/>	Not.Cred.	<p>Sibling: Samantha Moreno (14)</p>			
<input type="checkbox"/>	Notice of Hrg	<input checked="" type="checkbox"/>	<p>Petitioner states: that the child is currently residing with her. She states that the mother and the child have a volatile relationship and on several occasions there has been a physical altercation resulting in the child being sent to juvenile hall twice. The father is currently incarcerated for manslaughter and is awaiting sentencing. Petitioner alleges on 12/24/2012 the mother and child were arguing, the mother told the child to get into the car and the mother dropped the child off at a shelter and indicated if he came home she would send him to juvenile hall. The child went to the home of the petitioner and has been with her ever since. The petitioner states that the child is afraid to return to his mother's care and wishes to remain with the petitioner.</p>		
<input type="checkbox"/>	Aff.Mail				
<input type="checkbox"/>	Aff.Pub.				
<input type="checkbox"/>	Sp.Ntc.				
<input type="checkbox"/>	Pers.Serv.	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	Conf. Screen				
<input type="checkbox"/>	Letters	<input checked="" type="checkbox"/>			
<input checked="" 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 checked="" type="checkbox"/>	UCCJEA				
<input type="checkbox"/>	Citation				
<input type="checkbox"/>	FTB Notice				
				Reviewed by: LV	
				Reviewed on: 01/25/2013	
				Updates:	
				Recommendation:	
				File 16 - Moreno	

Petition for Appointment of Temporary Guardianship of the Person

Age: 9		<p align="center"><u>GENERAL HEARING 03/20/2013</u></p> <p>IRENE MONCADA, maternal grandmother, and JOE DAVID MONCADA, spouse of maternal grandmother are petitioners.</p> <p>Father: ROMALDO THOMAS NANEZ</p> <p>Mother: GUADALUPE F. ROSE HERRERA</p> <p>Paternal Grandfather: Romaldo Nanez, Sr. Paternal Grandmother: Cathy Romero</p> <p>Maternal Grandfather: John Herrera</p> <p>Petitioner states: the father is unable to provide a safe home environment for the child. Petitioner alleges that there are allegations of verbal, physical and emotional abuse towards the child by the father's wife. The mother is currently unable to provide a constant safe home environment due to pending legal matters which may lead to incarceration in the near future. Petitioner also states that the child could possibly already be in foster care.</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 Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Romaldo Thomas Nanez (Father) • Guadalupe F. Rose Herrera (Mother) 3. UCCJEA was not signed by the Petitioner, Irene Moncada. 	
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 <input checked="" type="checkbox"/>			
<input type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv. <input checked="" type="checkbox"/>			
<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 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: LV</p> <p>Reviewed on: 01/28/2013</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 17 - Herrera</p>

(1) Seventh Account Current and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney [Prob. C. 2620; 2623; 2630; 2942]

Age: 67	PUBLIC GUARDIAN , Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 11/01/10 – 10/31/12	<u>CONTINUED FROM 01/23/13</u>
	Accounting - \$130,970.22	
	Beginning POH - \$44,440.19	
	Ending POH - \$53,728.94	
Cont. from 012313		
<input type="checkbox"/> Aff.Sub.Wit.	Conservator - \$2,778.56	
<input checked="" type="checkbox"/> Verified	(21.20 Staff hours @ \$76/hr. and 12.16 Deputy hours @ \$96/hr.)	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Attorney - \$1,250.00 (Less than allowed per Local Rule)	
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail w/	Bond Fee - \$339.40 (ok)	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.	Petitioner prays for an Order:	
<input type="checkbox"/> Pers.Serv.	1. Authorizing, allowing and settling the seventh account;	
<input type="checkbox"/> Conf. Screen	2. Authorizing the conservator and attorney fees and commissions; and	
<input type="checkbox"/> Letters	3. Authorizing payment of the bond fee.	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt	Court Investigator Jennifer Daniel filed a report on 04/20/12.	
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 2620(c) n/a		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		Reviewed by: JF
<input type="checkbox"/> Status Rpt		Reviewed on: 01/24/13
<input type="checkbox"/> UCCJEA		Updates:
<input type="checkbox"/> Citation		Recommendation:
<input type="checkbox"/> FTB Notice		File 18 - Leslie