



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

1 Juan Lee Gonzales (CONS/P) Case No. 01CEPR00068

Conservator Gonzales, Deborah (Pro Per – Conservator)

Probate Status Hearing Re: Removal of Current Conservator

Age: 33	<p>DEBORAH GONZALES, mother, was appointed Conservator of the person, with medical consent powers on 04/05/2001.</p> <p style="text-align: center;"><u>Please see file for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cont. from		
Aff.Sub.Wit.		
Verified		
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Not.Cred.		
Notice of Hrg		
Aff.Mail		
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Conf. Screen		
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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: 01/27/2016</p>	
	<p>Updates:</p>	
	<p>Recommendation:</p>	
	<p>File 1- Gonzales</p>	

Sixteenth Account Current and Report of Successor Conservator and Petition for Allowance of Compensation to Successor Conservator and Attorney

		FRESNO COUNTY PUBLIC GUARIDAN, Conservator, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: If granted, the Court will set a status hearing for the filing of the next account for Monday, Dec. 18, 2017</p>
		Account period: 8/24/13 – 10/16/15	
		Accounting: \$322,981.63	
		Beginning POH: \$224,183.89	
		Ending POH: \$226,946.09 (cash)	
Cont. from 121415		Conservator: \$627.68	
<input type="checkbox"/>	Aff.Sub.Wit.	(for 2.58 Deputy hours @ \$96/hr and 5.0 Staff hours @ \$76.hr, per itemized statement attached to Declaration filed 12/28/15)	
<input checked="" type="checkbox"/>	Verified	Attorney: \$1,250.00 (Less than local rule)	
<input type="checkbox"/>	Inventory	Bond: \$1,365.30 (ok)	
<input type="checkbox"/>	PTC	Petitioner prays for an order:	
<input type="checkbox"/>	Not.Cred.	1. Approving, allowing and settling the attached account and report;	
<input checked="" type="checkbox"/>	Notice of Hrg	2. Authorizing the conservator's and attorney's fees and commissions;	
<input checked="" type="checkbox"/>	Aff.Mail	3. Authorizing payment of the bond fee; and	
<input type="checkbox"/>	Aff.Pub.	4. Any other orders the Court considers proper.	
<input type="checkbox"/>	Sp.Ntc.		
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<input checked="" type="checkbox"/>	Order		
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<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: skc
			Reviewed on: 1/27/16
			Updates:
			Recommendation:
			File 2 - Hernandez

3 Emily J. Williams (GUARD/P) Case No. 07CEPR00012

Petitioner Britton, Benny W., JR (Pro Per – Father)

Petition for Termination of Guardianship

Age: 10	BENNY W. BRITTON , father, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Termination of Guardianship for:</p> <ul style="list-style-type: none"> • Maia Shanay Williams (mother) • Paternal Grandparents (Not Listed) • Maternal Grandfather (Not Listed)
	EMILY JANE WILLIAMS , maternal grandmother, was appointed guardian on 03/05/2007. She was served by mail on 12/14/20015.	
Cont. from		
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<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: 01/28/2016
		Updates:
		Recommendation:
		File 3-Williams

**4 Timothy Worden, Samantha Worden, Jason Worden and Joshua Worden
(GUARD/P)**

Case No. 07CEPR00886

Petitioner Bolin, Jill (pro per – mother)

Petition for Termination of Guardianship

Timothy, 13	JILL BOLIN, mother, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 12/07/15 Minute Order from 12/07/15 states: Examiner notes provided in open court. Parties requesting visitation need to file/properly serve a petition for the Court's consideration on 02/01/16.</p> <p>As of 01/27/16, nothing further has been filed and the following notes remain:</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> or <i>Consent & Waiver of Notice</i> or <i>Declaration of Due Diligence</i> for: <ol style="list-style-type: none"> a. Ernestine Worden (paternal grandmother/guardian) b. Dustin Worden (father) c. Timothy Worden (minor) d. Bob Worden (paternal grandfather) e. Timothy Bolin (maternal grandfather) f. Maternal grandmother
Samantha, 11	ERNESTINE WORDEN, paternal grandmother, was appointed as Guardian of the minors on 07/15/08.	
Jason, 11	Father: DUSTIN WORDEN	
Joshua, 9	Paternal grandfather: BOB WORDEN	
Conf. from 120715	Maternal grandfather: TIMOTHY BOLIN Maternal grandmother: UNKNOWN	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Petitioner states [see file].	
<input type="checkbox"/> Inventory	Court Investigator Jennifer Young filed a report on 12/02/15.	
<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"/>	
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<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: 01/27/16
		Updates:
		Recommendation:
		File 4 - Worden

Guardian Vasquez, Emma (pro per – maternal great-grandmother/Guardian)
 Petitioner Mora, Juan (pro per – father)

Probate Status Hearing RE: Visitation

Age: 9	<p>EMMA VASQUEZ, maternal great-grandmother, was appointed as guardian on 01/24/08.</p> <p>JUAN MORA, father, filed a Petition for Termination of Guardianship on 07/28/14. The Petition for Termination was continued numerous times and ultimately denied on 04/27/15.</p> <p>Minute Order from hearing on 04/27/15 set this hearing regarding status of visitation and states: The Court orders the Court Investigator to personally re-interview the father, the guardian, and the minor, with no other party present, and provide an updated report about visitation.</p> <p>Court Investigator Jennifer Young filed a report on 06/11/15.</p> <p>Court Investigator Jennifer Young filed a report on 01/28/16.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 12/14/15</u> Minute Order from 12/14/15 states: Juan Mora requests that visits be increased to every Friday at 5pm through Monday at 8am. Emma Vasquez requests that overnight visits no longer be allowed due to the minor's behavior and medication not being given. Mr. Mora disputes that representation and states that he is giving the minor his medication as prescribed. The Court orders that the current visitation order remain for the next 30 days, and that the Court Investigator interview all parties and provide an updated report to the Court regarding the visits and the request for an increase.</p> <p><u>Note:</u> The current visitation schedule is every other weekend from Saturday at 10am through Sunday at 4pm.</p>
Cont. from 061515, 071315, 091415, 121415		
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Video Receipt		
<input checked="" type="checkbox"/> CI Report		
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Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 01/27/16
		Updates: 01/28/16
		Recommendation:
		File 5 - Mora

Atty Summer Johnson of Dowling, Aaron Inc., (for Petitioners Kate Singh and Hubert Mitchell, Co-Conservators of the Person)
 Atty Robert D. Wilkinson, of Baker Manock & Jensen (for Petitioner Bruce D. Bickel, Conservator of the Estate)

Petition for Approval of Third Account and Report of Conservator of the Estate; Request for Approval of Payment of Conservators Fees; Request for Approval; of Payment of Conservators' Attorney's Fees and Reimbursement of Costs Advanced; Request for Approval to Execute option Agreement and to Independently Exercise Power to Sell Kern County Real Property; Request for Approval to Reimburse expenses of Co-Conservators of the Person.

Age: 78 years		<p>KATE A. SINGH, niece, and HUBERT MITCHELL, brother, Co-Conservators of the Person, and BRUCE BICKEL, Conservator of the Estate, are Petitioners.</p> <p>Account period: 7/1/2014 – 6/30/2015</p> <p>Accounting - \$1,237,215.62 Beginning POH - \$1,135,256.98 Ending POH - \$1,028,357.79 <i>(\$200,008.69 is cash)</i></p> <p>Conservator/Person - Not requested</p> <p>Conservator/Estate - \$12,143.10 (per itemization and declaration 97.51 hours at \$150 per hour for fiduciary and transactional services, \$110 - \$125 per hour for case management services and \$60 per hour for case services.)</p> <p>Attorney for Conservator/Person - \$9,762.50 (per itemization and declaration for preparation of the accounting and review and analysis of option agreement. 41 hours @ \$275/hr.)</p> <p>Attorney costs - \$561.75 (filing fee and photocopies)</p> <p>Current Bond - \$966,000.00 (is sufficient)</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 1/11/16. Minute order states if the late-filed documents do not raise any issues, the Court will consider signing the order so that the 2/1/16 can come off calendar. Examiner note: the late filed documents did not address any of the following:</p> <ol style="list-style-type: none"> 1. This accounting was prepared by attorney Summer Johnson, attorney for the co-conservators of the person. It is unclear why the attorney for the co-conservators of the person is preparing the accounting and not the attorney for the conservator of the estate. Court may require clarification. 2. Need care facility statements pursuant to Probate Code §2620(c)(5). 3. Costs include \$126.75 in copy charges. Local Rule 7.17B states the court considers copy charges to be a normal cost of doing business and therefore are not reimbursable.
Cont. from 011116			
Aff.Sub.Wit.			
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Duties/Supp			
Objections			
Video Receipt			
✓ CI Report			
2620(c)	X		
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: KT</p> <p>Reviewed on: 1/27/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7- Mitchell</p>	

Petitioner states in the Spring of 2015, Mr. Bickel was approached by Recurrent Energy regarding entering into an Option Agreement for the sale of 2 parcels of real property belonging to the conservatorship estate ("Option Properties"). Recurrent Energy is interested in obtaining an Option Agreement in order to purchase the Option Properties for the purpose of developing a "solar farm."

The Option Properties were appraised by the probate referee as of the date of the establishment of the conservatorship as follows:

19.55 acres in Kern County appraised at \$35,000.00 and 9.55 acres in Kern County appraised at \$19,000.00.

Recurrent Energy proposes to purchase the Option Properties at \$12,500.00 per acre. Consequently the sales price for the 19.55 acre property would be \$244,375.00 and the sales price for the 9.55 acre property would be \$119,375.00.

Recurrent Energy proposes to pay non-refundable option payments totaling \$70,000 over 30 months following court approval (schedule outlined in pleadings).

Mr. Bickel believes that it is in the best interest of the Conservatorship to execute the Option Agreement as the Option Properties are currently undeveloped, not productive, not currently located in the pathway of any other type of commercial development and costs the conservatorship estate ongoing maintenance in the form of annual property taxes.

Mr. Bickel further requests the authority to reimburse the Co-Conservators of the person for travel related expenses to visit the conservatee. Mr. Mitchell and Ms. Singh, the Co-Conservators of the person, each reside outside the State of California. Mr. Mitchell and Ms. Singh believe that it is in the Conservatee's best interest that, in addition to the monitoring of his care by regular telephone and e-mail contact with his care providers at Cottonwood Court, that they visit the Conservatee, on a minimum, a quarterly basis in order to view firsthand his care and well-being. Mr. Mitchell and Ms. Singh estimate that the following amounts would be incurred by one (1) of them each quarter to visit the conservatee:

Flight (roundtrip):	\$600.00
Rental car:	\$400.00
Hotel (4 nights x 125/night):	\$500.00
Total amount:	\$1,500.00

With Court approval and authorization as requested herein, Mr. Bickel is in agreement with providing reimbursement, without additional court approval, to the Co-Conservators of the person, on a quarterly basis, for travel related expenses up to the amount of \$1,500.00.

Petitioners pray for an order that:

1. The Third Account and Report be settled, allowed, and approved as rendered, and all acts and transactions of Bruce Bickel set forth in it, or relating to the matters set forth in it, be ratified, confirmed and approved;
2. The Conservator of the Estate be authorized to pay himself compensation for services rendered in the amount of \$12,143.10;
3. The Conservator of the Estate be authorized to pay Dowling Aaron Inc. in the amount of \$9,762.50 for legal services rendered and \$561.75 for costs for costs advanced for a total amount of \$10,324.25;

Please see additional page

4. The Conservator of the Estate be authorized under Probate Code §2590 and 2591(b) to execute an Option Agreement form Recurrent Energy in the form attached as Exhibit "C";
5. The Conservator of the Estate be authorized under Probate Code §2590 and 2591(b) to independently execute the power to consummate the sale of the Option Properties consistent with the terms of the Option Agreement, without prior court approval or authorization;
6. The Conservator of the Estate be authorized to reimburse, on a quarterly basis, without further Court approval, the Co-Conservators of the Person, for travel related expenses up to the amount of \$1,500.00, incurred by the Co-Conservator's of the Person to visit the Conservatee, upon presentation of appropriate documents and receipts supporting the expenses incurred.

Court Investigator Report filed 7/7/2015

Note: If the petition is granted, a status hearing will be set as follows:

- **Wednesday, September 13, 2017** 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.

Note to Attorney: Probate Code §2620(c)(2) states the filing shall include all account statements showing the account balance at the closing date of the accounting period for the court accounting. If the court accounting is the first accounting the conservator shall provide the to the court all account balance immediately preceding the date the conservator was appointed and all account statements showing the account balance as of the close of the first court accounting. Therefore, it is unnecessary to file each and every account statements for the entire account period.

8 Isaac Roman, Ilin Roman & Ilyssa Roman (GUARD/P)

Case No. 13CEPR00983

Petitioner Roman, Guillermo (Pro Per – Maternal Grandfather)

Petitioner Avila, Maria Guadalupe (Pro Per – Maternal Grandmother)

Petition for Appointment of Guardian of the Person

Ilyssa age: 3 mons.		<p>TEMPORARY EXPIRES 02/01/2016</p> <p>MARIA G. AVILA and GUILLERMO ROMAN, maternal grandparents, are petitioners.</p> <p><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>This petition is as to ILYSSA ROMAN only.</p> <p>Petitioners were previously appointed as guardian for Isaac and Ilin (3/27/14).</p> <p>Minute Order of 12/07/2015: Examiner notes provided in open court; The Court grants one last continuance for the defects to be cured.</p> <p>The following issues remains:</p> <ol style="list-style-type: none"> 1. Need proof of personal service of the Notice of Hearing along with a copy of the petition or Consent and Waiver of Notice or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. Ricardo Cantu (father) 	
Cont. from 120715				
<input type="checkbox"/>	Aff.Sub.Wit.			
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<input type="checkbox"/>	Inventory			
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<p>Reviewed by: LV</p>				
<p>Reviewed on: 01/27/2016</p>				
<p>Updates:</p>				
<p>Recommendation:</p>				
<p>File 8 - Roman</p>				

First and Final Account and Report of Executor and Petition for its Settlement, and Petition for Allowance of Statutory Fees and Commissions, Extraordinary Fees to Attorneys Reimbursements to Attorneys and Executor for Costs Advanced, and for Final Distribution

DOD: 06/19/12	JULIA WILLIAMS , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 06/19/12 – 10/26/15	
	Accounting: \$129,891.00	
	Beginning POH: \$122,500.00	
	Ending POH: \$116,519.29	
	(\$114,019.29 is cash)	
Cont. from	Executor: \$4,896.73 (statutory)	
<input type="checkbox"/> Aff.Sub.Wit.	Executor costs: \$7,572.10 (itemized, for maintenance of real property assets of the estate)	
<input checked="" type="checkbox"/> Verified	Attorney: \$4,896.73 (statutory)	
<input checked="" type="checkbox"/> Inventory	Attorney x/o: \$2,000.00 (for sale of two parcels of real property)	
<input checked="" type="checkbox"/> PTC	Attorney costs: \$1,033.30 (filing fees, certified copies, probate referee)	
<input checked="" type="checkbox"/> Not.Cred.	Closing: \$2,500.00	
<input checked="" type="checkbox"/> Notice of Hrg	Petitioner states that decedent's will distributes the residue of the estate to Julia Williams as trustee of decedent's living trust. However, the living trust was allegedly revoked by decedent, although no documentation has been produced to establish that the specific process required to revoke the trust was ever executed. Petitioner states that the distributive terms of the Trust are identical to the laws of intestate succession. In order to avoid any potential litigation, Petitioner proposes to distribute the property to decedent's intestate heirs rather than to the trustee of the trust.	
<input checked="" type="checkbox"/> Aff.Mail w/	Continued on Page 2	
<input type="checkbox"/> Aff.Pub.		
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<input type="checkbox"/> Letters 06/20/14		
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<input type="checkbox"/> CI Report		
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<input type="checkbox"/> Aff. Posting		
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<input type="checkbox"/> Citation		
<input checked="" type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 01/27/16
		Updates:
		Recommendation:
		File 9- Smith

Distribution, pursuant to intestate succession, is to:

Julia Williams:	\$13,017.19
Linda F. Alexander:	\$10,517.19 (\$13,017.19 less \$2,500.00 to be distributed to Monika Williams as reimbursement for van that was specifically devised to Monika Williams), Plus 2001 Dodge Caravan
Monika Williams:	\$15,517.19 plus undivided share of household items
Sandra Smith:	\$13,017.19 plus undivided share of household items
Cynthia Williams:	\$13,017.19 plus undivided share of household items
Deborah Smith Spearman:	\$13,017.20 plus undivided share of household items
Anthony Mack, Jr.:	\$2,603.44
Jennifer Mack:	\$2,603.44
Janis Mack Cowings:	\$2,603.44
Jessica Alexander:	\$2,603.44
Jawana Chantel-Bishop:	\$2,603.44

Petition for Appointment of Guardian of the Person

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 11/30/15. The following remains noted:</p> <ol style="list-style-type: none"> If diligence is not found, need personal service on the mother and maternal grandmother per Probate Code §1511. <p>See declarations of due diligence filed 11/18/15 re mother and 1/22/16 re maternal grandfather.</p>	
Cont. from 113015				
	Aff.Sub.Wit.			
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	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
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	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 1/27/16	
			Updates:	
			Recommendation:	
			File 10 - Tshimika	

Probate Status Hearing RE: Receipt for Blocked Account

	<p>DEBORAH TITUS, Conservator, petitioned the court for an Order Confirming Sale of Real Property.</p> <p>The Order Confirming Sale of Real Property was signed on 7/29/15. The proceeds from the sale were ordered placed into a blocked account.</p> <p>Minute Order dated 7/29/15 set this status hearing for receipt for blocked account.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need receipt for blocked account 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 082615, 102115, 120715		
Aff.Sub.Wit.		
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Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>Reviewed by: KT</p> <p>Reviewed on: 1/27/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11A – Dolby</p>	

Petition for Order Directing Establishment of a Pooled Special Needs Trust, Setting Bond, Authorizing Trustee's Fees, and Approving Attorney's Fees

		DEBORAH TITUS , Conservator, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Petition make reference to Exhibit B, Court Directed Joinder Agreement. No exhibit B was attached to the Petition. Probate Code §3604(d) states an order for payment of money to a special needs trust shall include a provision that all statutory liens in favor of the Department of Health Care Services, the State Department of State Hospitals, the State Department of Developmental Services, and any county or city and county in the state shall first be satisfied. Petition does not address whether or not any liens have been satisfied. Need Declaration of Gary Bagdasarian re: attorney fees. Need order.
		Petitioner states conservatee's disabilities require her to have help with daily activities. She resides at Sierra Vista Healthcare Center, where she receives 24-hour care. Because of her disabilities conservatee receives Social Security survivor benefits, Medicare and Medi-Cal health care services.	
Cont. from 120715		On 8/21/15, conservatee's ½ interest in real property, her prior residence, was sold. Conservatee will receive \$37,452.57. The outright distribution of this sum to her will render her ineligible for Medi-Cal, which is an essential component of the funding stream which provides for her group home placement. Therefore, to retain eligibility for these essential public benefits, proceeds from the sale of the conservatee's residence must be transferred to a pooled special needs trust.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	PTC		
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<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	The Golden Statue Pooled Trust was created, and is managed by the North Bay Housing Coalition, a California not-for-profit corporation located in Napa, California. Currently there are approximately 130 beneficiaries of the Golden State Pooled Trust with sub-accounts totaling almost \$10.5 million.	
		Please see additional page	
		Reviewed by: KT	
		Reviewed on: 1/27/16	
		Updates:	
		Recommendation:	
		File 11B - Dolby	

The proposed Golden State Pooled Trust also meets all the requirements of California Rules of Court 7.903(c).

The Petitioner, Deborah Titus, the conservator of the Person and Estate, shall serve as the Beneficiary Advocate. All distributions requested by the Beneficiary Advocate are reviewed by Golden State Pooled Trust for appropriateness and compliance with benefit laws.

Pursuant to Probate Code §2643, Petitioner requests that the Court authorize the Trustee to receive an initial \$1,500.00 set up fee, and annual payments on account at the rate of 1.5% of the funds in the individual sub-account or \$1,500.00, whichever is greater.

Petitioner requests that the trust be authorized to invest in mutual funds with a terms longer than five years.

Petitioner requests attorney fee for her attorney, Gary Bagdasarian as set forth in the Declaration of Gary Bagdasarian. (**Note:** As of 1/27/16 Declaration of Gary Bagdasarian has not been filed.)

Wherefore, Petitioner prays for an Order:

1. Directing the establishment of a Pooled Special Needs Trust for Florence E. Dolby for receipt of the proceeds from the sale of her ½ interest in her former residence;
2. Authorizing and directing the Conservator to execute the necessary documents including the Joinder Agreement, in order to establish Florence Dolby's account in the Golden State Pooled Trust in accordance with the Court-Directed Joinder Agreement;
3. Authorizing the Trustee of the Golden State Pooled Trust to invest in mutual funds held and traded within the United States, and in government bonds maturing in less than five years;
4. Setting bond in the amount of \$34,000.00 to be secured by the Trustee of the Golden State Pooled Trust;
5. Authorizing Golden State Pooled Trust a \$1,500.00 set up fee, and ongoing fees paid on account at the rate of 1.5% per annum with a \$1,500.00 minimum, with said fees to be reported and confirmed by the Court at the time of periodic accountings;
6. Requiring periodic accounts and reports of the Trustee to be filed with the Court in accordance with procedures and schedule set forth in the California Probate Code;
7. Authorizing and directing the Trustee to pay Gary Bagdasarian for legal services and costs in an amount approved by the court, and set forth in the Declaration of Gary Bagdasarian.

Please see additional page

If the petition is granted the special needs trust will need to be filed into a new case file.

Note: If the petition is granted, status hearings will be set as follows:

- **Wednesday, March 2, 2016** at 9:00 a.m. in Department 303, for the opening of a new Special Needs Trust file and filing of the bond.
- **Wednesday, May 3, 2017** at 9:00 a.m. in Department 303, for the filing of the first account in the Special Needs Trust.

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.

Probate Status Hearing Re: Filing of First Account

	DEBORAH TITUS was appointed conservator of the person and estate on 7/15/14 with bond set at \$20,000.00.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>2. Need first account 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>
	Bond was filed on 8/14/14.	
Cont. from	Letters issued 8/21/14.	
Aff.Sub.Wit.	I & A filed 10/28/14 showing the estate valued at \$50,380.63.	
Verified	Minute order dated 7/15/14 set a status hearing on 12/21/15 for the filing of the first account.	
Inventory	Minute order dated 12/7/15 continued the status hearing of 12/21/15 to 2/1/16.	
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: 1/27/16
		Updates:
		Recommendation:
		File 11C-Dolby

First Account and Report of Administrator and Petition for Allowance of Ordinary Commissions and Fees and for Distribution

DOD: 08/06/14	PUBLIC ADMINISTRATOR , Administrator, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Assignment of interest by Dionne Griffin filed on 08/28/15 and 10/21/15 total \$29,140.00, but her distributive share is \$24,280.89.</p>
	Account period: 08/18/14 – 11/19/15	
Cont. from	Accounting: \$193,528.45	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH: \$192,120.43	
<input checked="" type="checkbox"/> Verified	Ending POH: \$112,935.63 (all cash)	
<input checked="" type="checkbox"/> Inventory	Administrator: \$6,715.86 (statutory)	
<input checked="" type="checkbox"/> PTC	Attorney: \$6,715.86 (statutory)	
<input checked="" type="checkbox"/> Not.Cred.	Bond fee: \$483.83 (ok)	
<input checked="" type="checkbox"/> Notice of Hrg	Costs: \$896.50 (filing fees, certified copies)	
<input checked="" type="checkbox"/> Aff.Mail w/	Closing: \$1,000.00	
Aff.Pub.	Preliminary distributions were made, pursuant to Notice of Proposed Action on 08/25/15, as follows:	
Sp.Ntc.	James Griffin, Natalie Griffin & Jaylyne Griffin - \$10,000.00 each; Dionne Griffin - \$9,720.00 (\$280 restitution paid to Victim's Compensation Board)	
Pers.Serv.	Distribution, pursuant to intestate succession, is to:	
Conf. Screen	James Griffin: \$6,180.90 (pursuant to Assignment of Interest filed 01/04/16, \$18,100.00 of James Griffins share will be distributed to Inheritance Funding Company)	
<input type="checkbox"/> Letters 10/08/14	Natalie Griffin: \$24,280.90	
<input type="checkbox"/> Duties/Supp	Jaylyne Griffin: \$24,280.89	
<input type="checkbox"/> Objections	Dionne Griffin: \$0.00 (pursuant to assignments of interest filed 08/25/15 and 10/21/15, Dionne Griffin's share is to be distributed to Inheritance Funding Company)	
<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		
		<p>Reviewed by: JF</p> <p>Reviewed on: 01/27/16</p> <p>Updates: 01/28/16</p> <p>Recommendation:</p> <p>File 12- Graham</p>

First and Final Account and Report of Administrator and Petition for Settlement, Allowance of Commissions and Fees, on Waiver of Account, and Final Distribution

DOD: 01/15/15	MARY ANN NEWQUIST , Administrator, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. The Order does not state the property on hand for distribution as required pursuant to Local Rule 7.6.1C. Need revised Order.</p>
	Accounting is waived.	
Cont. from	I & A - \$168,199.74	
<input type="checkbox"/> Aff.Sub.Wit.	POH - \$166,608.30 (all cash)	
<input checked="" type="checkbox"/> Verified	Administrator - waived	
<input checked="" type="checkbox"/> Inventory	Attorney - \$6,046.00	
<input checked="" type="checkbox"/> PTC	Costs - \$47.00 (total costs of \$877.00 less \$830.00 paid for filing fees, certified copies, publication)	
<input checked="" type="checkbox"/> Not.Cred.	Petitioner states that she, as beneficiary, will assume payment of any income taxes due as a result of a gain of \$15,299.53 from a retirement annuity.	
<input checked="" type="checkbox"/> Notice of Hrg	Distribution, pursuant to intestate succession, is to:	
<input checked="" type="checkbox"/> Aff.Mail w/	Mary Ann Newquist - \$160,515.30 cash	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters 04/29/15		
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: 01/27/16
		Updates:
		Recommendation:
		File 13- Newquist

Petitioner Verduzco, Joaquin (Pro Per – Step-Father)

Attorney Lovegren-Tipton, Amy R. (for Sandra Kozorra aka Frizel – Objectior -Maternal Grandmother)

Petition for Appointment of Guardianship of the Person

Amarisa Age: 13		<p>TEMPORARY EXPIRES 02/01/2016</p> <p>JOAQUIN VERDUZCO, step-father, is petitioner.</p> <p><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. 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 or declaration of due diligence for:</p> <ul style="list-style-type: none"> • Jason Ray Boulware (Father of Amarrisa) • Justin Tidey (Father of Krysta) <p>Note: Justin Tidey was served by mail on 11/24/2015, only 13 days prior to the hearing and not the 15 days as required. Service was also by mail and not personal service as required.</p> <ul style="list-style-type: none"> • Deena Fay Kozorra (Mother) <p>Note: Deena Fay Kozorra was served by mail on 11/24/2015, only 13 days prior to the hearing and not the 15 days as required. Service was also by mail and not personal service as required.</p> <ul style="list-style-type: none"> • Amarrisa Kozorra (Minor) <p>Note: Amarrisa was served by mail on 11/24/2015, only 13 days prior to the hearing and not the 15 days as required. Service was also by mail and not personal service as required.</p> <p style="text-align: center;"><u>Please see additional page</u></p>	
Krysta Age: 11				
Cont. from 091415, 110215, 120715				
<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.			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			
<p>Reviewed by: LV</p> <p>Reviewed on: 01/27/2016</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 15 - Kozorra</p>				

NEEDS/PROBLEMS/COMMENTS continued:

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:

- Paternal Grandparents (of Amarissa) – Unknown
- Keith Stevens (Paternal Grandfather of Krysta)

Note: Keith Stevens was served by mail on 11/24/2015, only 13 days prior to the hearing and not the 15 days as required.

- Mechelle Tidey (Paternal Grandmother of Krysta)

Note: Mechelle Tidey was served by mail on 11/24/2015, only 13 days prior to the hearing and not the 15 days as required.

- Sandra Frizel (Maternal Grandmother)

Note: Sandra Frizel was served by mail on 11/24/2015, only 13 days prior to the hearing and not the 15 days as required.

3. The Notice of Hearing filed 12/02/2015 does not indicate that a copy of the petition was served along with the notice of hearing at #5 of the proof of service. The Court may require clarification.
4. UCCJEA is incomplete. Need minors' residence information for the past 5 years.
5. Page #5 of the Guardianship Petition – Child Information Attachment (GC 210(CA)) which pertains to whether the children have Native American Ancestry was not completed. Need declaration with page #5 attached for each of the minors.

	See petition for details.	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 11/30/15:</u> Examiner notes provided in open court. As of 1/27/16, nothing further has been filed. The following issues remain noted: 1. The Court Investigator's report indicates that the minor Cydney resides with a maternal aunt in Texas; therefore, guardianship for Cydney is not recommended. However, a Notice of Hearing filed 11/13/15 indicates that Cydney was personally served along the maternal grandfather and the minor Arian at Petitioner's address in Squaw Valley, CA. Therefore, need clarification: Is Cydney currently/permanently residing with Petitioner in California? <p style="text-align: center;">SEE PAGE 2</p> Reviewed by: skc Reviewed on: 1/27/16 Updates: Recommendation: File 16 – Thomas/Huffman/Reynolds
Cont. from 102615, 113015		
<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 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		

Petitioner Johnny Trujillo (Pro Per)
 Petitioner Yesbeth Trujillo (Pro Per)

Petition for Appointment of Guardian of the Person

		<p>TEMPORARY EXPIRES 10/27/2015; extended to 12/7/2015; extended to 2/1/2016</p>	<p>NEEDS/PROBLEMS/COMMENTS: <u>Continued from 12/7/2015.</u> Minute Order states Jose Garcia, father, represents that he was released from an 8-year prison term in October, and will be off parole in 5 months' time. Petitioners report that Mr. Garcia is currently living in their home; the Court admonishes that other arrangements need to be made. The Court grants one last continuance for the defects to be cured. (Note: All defects have been cured.)</p>
<p>JOHNNY TRUJILLO and YESBETH TRUJILLO, paternal uncle and aunt, are Petitioners.</p>			
<p>Cont. from 102715, 120715</p>		<p>Court Investigator's Report was filed on 10/19/2015.</p>	
<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.	N/A	
<input checked="" type="checkbox"/>	Conf. Screen		
<input 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		
			<p>Reviewed by: LEG</p>
			<p>Reviewed on: 1/27/16</p>
			<p>Updates:</p>
			<p>Recommendation:</p>
			<p>File 17 – Garcia</p>

18 Stacy Sanchez, Nadine Sanchez, & Fabian Quiroz, JR (GUARD/P)

Case No. 15CEPR00831

Petitioner Cristilde N. Gutierrez (Pro Per)

Petition for Appointment of Guardian of the Person

		NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS: Continued from 11/30/2015 per Petitioner's request. The following issues from the last hearing remain: 1. Need <i>Notice of Hearing</i> and proof of personal service of the <i>Notice of Appointment of Guardian, or Consent to Appointment of Guardian and Waiver of Notice, or a Declaration of Due Diligence</i> , for: <ul style="list-style-type: none"> • Fabian Quiroz, father of Fabian, Jr.; • Father of Stacy; • Father of Nadine. 2. Need proof of service by mail of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian, or Consent to Appointment of Guardian and Waiver of Notice, or a Declaration of Due Diligence</i> , for: <ul style="list-style-type: none"> • paternal grandparents of Stacy; • paternal grandparents of Nadine; • Alicia Quiroz, paternal grandmother of Fabian; • paternal grandfather of Fabian; • Mary Santiago, maternal grandmother; • Gustavo Sanchez, maternal grandfather, <i>if Court does not find due diligence per Declaration filed 8/25/2015 stating he was deported in June 2015 and his whereabouts are unknown.</i>
		CRISTILDE N. GUTIERREZ , maternal aunt, is Petitioner. <i>~Please see Petition for details~</i> Court Investigator's Report was filed on 10/13/2015.	
Cont. from 102615, 113015			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed by: LEG	
		Reviewed on: 1/27/16	
		Updates:	
		Recommendation:	
		File 18 – Sanchez/Quiroz	

19 Gabriel Garcia (GUARD/P) Case No. 15CEPR00909

Petitioner Heredia, Connie Villa (Pro Per – paternal grandmother)

Petition for Appointment of Guardian of the Person

Age: 12		<p><u>TEMPORARY EXPIRES 02/01/2016</u></p> <p>CONNIE HEREDIA, paternal grandmother, is petitioner.</p> <p><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 11/30/2015: Examiner notes provided in open court. Ms. Heredia represents that the paternal grandfather's name is Victor Garcia, the maternal grandfather is deceased, and the maternal grandmother's name is Denise Holland. Continued for service as to Mr. Garcia and Ms. Holland.</p> <p>All issues on the Examiner notes have been cleared.</p>	
Cont. from 113015				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			x
✓	Aff.Mail			w/
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			n/a
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
Reviewed by: LV				
Reviewed on: 01/27/2016				
Updates:				
Recommendation:				
File 19 - Garcia				

Age: 4	<p>TEMPORARY EXPIRES <u>02/01/2016</u></p> <p>Kjiyana Nash, non-relative, is petitioner.</p> <p><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CI to Provide Supplemental Report.</p> <ol style="list-style-type: none"> 1. 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 or declaration of due diligence for: <ul style="list-style-type: none"> • Father (Unknown) 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"> • Paternal Grandparents (Not Listed) • Maternal Grandfather (Not Listed) <p>Note: Notice of Hearing filed 10/07/2015 shows an individual by the name of Kemal Clark was personally serve on 10/01/2015 however it is unclear what the relationship is to the minor.</p> 3. Notice of Hearing with proof of service filed 10/07/2015 shows Laurie Scott served Kemal Clark who resides in Clovis, New Mexico on 10/01/2015 at 12:00pm and Peggy Clark who resides in Riverdale, Illinois on 10/01/2015 at 12pm. Need clarification.
Cont. from 120715		
<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"/> x		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv.		
<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"/> x		
<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: 01/27/2016</p>		
<p>Updates:</p>		
<p>Recommendation:</p>		
<p>File 20- Clark</p>		

21 Jeffrey Lester & Elizabeth Lester Revocable Living Trust 12/17/11

Case No. 15CEPR01060

Attorney Lester, Tyler H. (for Petitioner Elizabeth Suzanne Lester)

Petition for Instructions (Prob. Code §§ 850, 17200.1)

Jeffrey Lester DOD: 12/18/11		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Amended petition filed 12/31/15 is set for hearing in 2/17/16.</p>
Cont. from 121415		
Aff.Sub.Wit.		
Verified	x	
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	x	
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 1/27/16
		Updates:
		Recommendation:
		File 21 - Lester

22 Joseph Anthony Bruno (Estate)

Case No. 15CEPR01107

Petitioner Bruno, Bryan (Pro Per – Son)

Probate Will and for Letters Testamentary, Authorization to Administer Under IAEA

DOD: 10/06/2015		<p>BRYAN BRUNO, son, is petitioner and requests appointment as Executor without bond.</p> <p>Full IAEA – o.k.</p> <p>Will dated: 06/18/2012</p> <p>Residence: Fresno Publication: Fresno Bee</p> <p>Estimated value of the Estate:</p> <table> <tr> <td>Personal property</td> <td>-</td> <td>\$12,9708.00</td> </tr> <tr> <td>Real property</td> <td>-</td> <td>\$163,000.00</td> </tr> <tr> <td>Total</td> <td>-</td> <td>\$292,708.00</td> </tr> </table> <p>Probate Referee: Rick Smith</p>	Personal property	-	\$12,9708.00	Real property	-	\$163,000.00	Total	-	\$292,708.00	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute order of 12/14/2015: Examiner notes provided in open court.</p> <ol style="list-style-type: none"> Will is not self-proving. Need proof of subscribing witness. Need Confidential Supplement to Duties & Liabilities of Personal Representative, Mandatory Judicial Council Form DE-147S. Need name and date of death of the deceased spouse pursuant to Local Rule 7.1.1D. #5a(3) or #5a(4) was not answered regarding a registered domestic partner. <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> Monday, 05/23/2016 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and Monday, 03/27/2017 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
Personal property	-		\$12,9708.00									
Real property	-		\$163,000.00									
Total	-		\$292,708.00									
Cont. from 121415												
Aff.Sub.Wit.	x											
<input checked="" type="checkbox"/> Verified												
Inventory												
PTC												
Not.Cred.												
Notice of Hrg	n/a											
Aff.Mail	n/a											
Aff.Pub.												
Sp.Ntc.												
Pers.Serv.												
Conf. Screen												
<input checked="" type="checkbox"/> Letters												
<input checked="" type="checkbox"/> Duties/Supp												
Objections												
Video Receipt												
CI Report												
9202												
<input checked="" type="checkbox"/> Order												
Aff. Posting												
Status Rpt												
UCCJEA												
Citation												
FTB Notice												
		<p>Reviewed by: LV</p>										
		<p>Reviewed on: 01/27/2016</p>										
		<p>Updates:</p>										
		<p>Recommendation:</p>										
		<p>File 22 - Bruno</p>										

DOD: 6/8/02		<p>JUNUS B. PERRY, JR., Son, is Petitioner and requests appointment as Executor (<i>sic</i>) with Full IAEA without bond.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Duties and Liabilities of Personal Representative (DE-147) and Confidential Supplement (DE-147S). 2. Petitioner states the decedent died intestate, but requests appointment as Executor. It appears appointment as Administrator would be more appropriate. 3. Petitioner estimates the estate consists of \$175,000.00 in annual gross income from real property. Need clarification as to whether this may be a clerical error. Does petitioner mean to estimate income from real property, or the real property itself? 4. The petition is blank at #5a(3) and (4). Was the decedent survived by a registered domestic partner? 5. The petition is blank at #5a(7) and (8). Was the decedent survived by issue of a predeceased child? 6. Petitioner lists only one name at #8, Marceleen C. Perry, but does not indicate her relationship to the decedent or address. Is this the surviving spouse? Probate Code §8002(a)(3). 7. If any relatives are deceased, need dates of death. Local Rule 7.1.1.D. 8. Need Notice of Petition to Administer Estate (DE-121) and proof of service on all relatives entitled to notice under Probate Code §8110, including Marceleen C. Perry. 9. Need publication pursuant to Probate Code §8120. 10. Need Order, Letters. Local Rule 7.1.1.F. <p>Note: This petition was filed with a fee waiver. Please note that if assets are distributed pursuant to this probate, all Court filing fees will be due prior to distribution.</p> <p>Note: If granted, the Court will set status hearings for the filing of the Inventory and Appraisal pursuant to Probate Code §8800 and the filing of the first account or petition for final distribution pursuant to Probate Code §12200. At this time, dates are not provided as it does not appear that the petition is ready to move forward.</p>	
Cont. from 121415				
Aff.Sub.Wit.				Full IAEA – Need publication
✓ Verified				
Inventory				Decedent died intestate
PTC				
Not.Cred.				
Notice of Petition to Administer	x			Residence: Fresno
Aff.Mail	x			Publication: Need publication
Aff.Pub.	x			
Sp.Ntc.		Estimated value of estate: Annual income from real property (<i>sic</i>): \$175,000.00		
Pers.Serv.				
Conf. Screen				
Letters	x	Probate Referee: Steven Diebert		
Duties/Supp	x			
Objections				
Video Receipt				
CI Report				
9202				
Order	x			
Aff. Posting				
Status Rpt				
UCCJEA				
Citation				
FTB Notice				
Reviewed by: skc				
Reviewed on: 1/27/16				
Updates:				
Recommendation:				
File 23 - Perry				

Petitioner: Melissa Puga (pro per)

Objector: Amanda Puga (pro per)

Petition for Appointment of Guardian of the Person

		<u>TEMPORARY EXPIRES 2/1/16</u>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need proof of personal service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. Jose Ramirez, Jr (father) b. Amanda Puga (mother) 2. Need proof of service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. Paternal grandfather b. Esther Ramirez (paternal grandmother)
		<p>MELISSA PUGA, maternal grandmother, is petitioner.</p> <p>Please see petition for details.</p> <p>Objections of mother, Amand Puga filed on 12/10/15.</p> <p>Court Investigator Report filed on 1/26/16.</p>	
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	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: KT
			Reviewed on: 1/27/16
			Updates:
			Recommendation:
			File 25-Ramirez

Petitioner Karen Adele Higgins (Pro Per Petitioner)
 Attorney David N. Knudson (Court-appointed for proposed Conservatee)

Petition for Appointment of Probate Conservator

		NO TEMPORARY REQUESTED	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator Advised Rights on 1/21/2016.</p> <p>Note: CI Report filed 1/26/2016 states Michael Higgins, father, objects to the petition and will be filing a petition, likely for a Limited Conservatorship. Court records do not show a competing petition for appointment of probate conservator has been filed as of 1/27/2016.</p>
		<p>KAREN ADELE HIGGINS, mother, is Petitioner and requests appointment as Conservator of the Person with medical consent powers.</p> <p style="text-align: center;"><i>~Please see Petition for details~</i></p> <p>Court Investigator's Report was filed on 1/26/2016.</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 checked="" type="checkbox"/>	Aff.Mail	W/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input checked="" type="checkbox"/>	Objections		
<input checked="" 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 type="checkbox"/>	UCCJEA		
<input checked="" type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			<p>Reviewed by: LEG</p> <p>Reviewed on: 1/27/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 26-Higgins</p>

Petition for Letters of Administration; Authorization to Administer Under the IAEA

DOD: 01/19/05	JOAN DAVIS WILEY , daughter, is Petitioner and requests appointment as Administrator without bond.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> The Petition is not marked at item 5(a)(7) or (8) regarding issue/no issue of a predeceased child. If the decedent was survived by issue of a predeceased child, waiver of bond would be needed from those heirs. Need Duties & Liabilities of Personal Representative and Confidential Supplement to Duties and Liabilities of Personal Representative. Need Order and Letters. <p>Notes: Pursuant to Local Rule 7.1.1D, if a beneficiary, child, heir, spouse or registered domestic partner in any action before the Probate Court is deceased, that person's date of death shall be included in the Petition. Petitioner attached a death certificate for Malves Smith which appears to be decedent's spouse. However, Ms. Smith's name and date of death should be listed in item 8 of the Petition. The Court may require clarification that Malves Smith is the decedent's deceased spouse.</p> <p>Petitioner used an outdated Notice of Petition to Administer Estate; however, the Publication contains the updated creditor language.</p> <p>Note: If the Petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Monday, 07/11/16, at 9:00am in Dept. 303 for filing of the Inventory & Appraisal; and Monday, 04/03/17, at 9:00am in Dept. 303 for filing of the Petition for Final Distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter, the status hearing will come off calendar and no appearance will be required.</p>
Cont. from	Full IAEA – OK	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	All heirs waive bond (see note 1)	
<input type="checkbox"/> Inventory	Decedent died intestate	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Residence: Fresno	
<input checked="" type="checkbox"/> Notice of Hrg	Publication: The Business Journal	
<input checked="" type="checkbox"/> Aff.Mail w/o	Estimated Value of the Estate:	
<input checked="" type="checkbox"/> Aff.Pub.	Personal property- \$ 500.00	
<input type="checkbox"/> Sp.Ntc.	Real property - 200,000.00	
<input type="checkbox"/> Pers.Serv.	Total - \$200,500.00	
<input type="checkbox"/> Conf. Screen	Probate Referee: STEVEN DIEBERT	
<input type="checkbox"/> Letters x		
<input type="checkbox"/> Duties/Supp x		
<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: JF		
Reviewed on: 01/27/16		
Updates:		
Recommendation:		
File 27-Smith		

Petition for Letters of Administration: Authorization to Administer Under the IAEA

DOD: 06/16/15	RICHARD WHEATLEY, SR. , nephew, is Petitioner and requests appointment as Administrator without bond.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need authority for granting a personal representative of an estate powers to access, marshal assets and close Trust Accounts. It appears that a Trust Petition may be more appropriate for those actions. 2. Petitioner is a resident of San Antonio, Texas. The Court may require bond if the proposed personal representative resides outside of California or for other good cause, even if bond is waived. <i>California Rules of Court 7.201(b)</i> and <i>Probate Code § 8571</i>. If bond is required, it appears bond should be set at \$83,177.85 if the amount stated to be Trust assets rather than estate assets (\$285,013.87) is excluded. <p style="text-align: center;">Continued on Page 2</p>	
	Petitioner is a resident of San Antonio, Texas.		
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified	Full IAEA – ok		
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC	All heirs waive bond		
<input type="checkbox"/> Not.Cred.	Residence: Fresno		
<input checked="" type="checkbox"/> Notice of Hrg	Publication: The Business Journal		
<input checked="" type="checkbox"/> Aff.Mail			
<input checked="" type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen	Probate Referee: RICK SMITH		
<input checked="" type="checkbox"/> Letters	<p>Petitioner states that \$285,013.87 of the estimated personal property of the estate is money held in cash accounts in the name Mary Van Hoosan Trustee of the Van Hoosan Family Trust or the Van Hoosan Family Trust. Petitioner has made a diligent search and inquiry to attempt to locate the trust instrument and will of decedent, but no such documents have been found. Petitioner has inquired at the institutions where the money is held, but they are unable to respond due to privacy laws.</p> <p style="text-align: center;">Continued on Page 2</p>		
<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 type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			<p>Reviewed by: JF</p> <p>Reviewed on: 01/27/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 28-Hoosan</p>

28 Mary Van Hoosan aka Mary J. Van Hoosan aka Mary Vanhoosan

Page 2

Petitioner requests that the Court enter its order providing Petitioner with the authority to access and close the Trust Accounts and to take possession of the monies and deposit them in an estate account separate from all other assets of the estate. Petitioner further requests that the Order allow Petitioner to obtain any and all trust documents held by the financial institutions. Thereafter, based on the sufficiency or insufficiency of the trust documents obtained, Petitioner be ordered to file an ex parte petition with the court to either have the money obtained from the Trust Accounts transferred to the successor trustee under the terms of the Trust instrument, or Petition the Court to have the money treated as assets of the probate estate based on the insufficiency of the trust documents obtained.

Note: If the Petition is granted, status hearings will be set as follows:

- **Monday, 02/29/16, at 9:00am in Dept. 303** for filing of the Bond, if required and for Status regarding Trust Accounts;
- **Monday, 07/11/16, at 9:00am in Dept. 303** for filing of the Inventory & Appraisal; and
- **Monday, 04/03/17, at 9:00am in Dept. 303** for filing of the Petition for Final Distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter, the status hearing will come off calendar and no appearance will be required.

Dept. 303, 9:00 a.m. Monday, February 1, 2016

Petition for Appointment of Temporary Conservator

Age: 18	<u>GENERAL HEARING: 02/23/16</u>	NEEDS/PROBLEMS/COMMENTS:
	PATRICIA BORJA , mother, is Petitioner and requests appointment as temporary conservator of the person.	Court Investigator advised rights on 01/22/16.
	Petitioner states [see file].	Note for general hearing: Capacity Declaration filed 01/19/15 is missing the doctor's initials at item 7b. The doctor must initial in addition to checking the box at 7b. A revised capacity declaration will be needed if medical consent powers are to be granted. The General Conservatorship hearing may be delayed due to this issue.
Cont. from	Court Investigator Dina Calvillo filed a report on 01/26/16.	1. Need proof of service at least 5 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Conservator</i> for:
<input type="checkbox"/> Aff.Sub.Wit.		a. Paternal and maternal grandparents (if any) – service by mail ok
<input checked="" type="checkbox"/> Verified		Note: the general petition only lists the parents and sister of the proposed conservatee. All relatives within the second degree (parents, grandparents, siblings) are to be listed and are entitled to notice.
<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 type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		Reviewed by: JF
<input type="checkbox"/> Status Rpt		Reviewed on: 01/28/16
<input type="checkbox"/> UCCJEA		Updates:
<input type="checkbox"/> Citation		Recommendation:
<input type="checkbox"/> FTB Notice		File 29-Borja

Attorney Catherine A. Amador (for Petitioner Vanice J. Upton)
 Attorney Jon P. Adams (retained by proposed Conservatee)

Petition for Appointment of Temporary Conservator of the Person and Estate

		<u>GENERAL HEARING SET FOR 2/24/2016</u>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator Advised Rights on 1/22/2016.</p> <ol style="list-style-type: none"> Pursuant to Probate Code 2250.2(c), need proof of five (5) court days' notice by personal service of the Notice of Hearing and a copy of the Petition for Appointment of Temporary Conservator for: <ul style="list-style-type: none"> MARY ECONOMOU, proposed Conservatee (<i>Proof of Service by Mail filed 1/25/2016 is insufficient.</i>) Pursuant to Probate Code 2250(e), need proof of five (5) court days service by mail of the Notice of Hearing and a copy of the Petition for Appointment of Temporary Conservator for: <ul style="list-style-type: none"> SYRMA ALBERTI, sister (<i>Proof of Service by Mail filed 1/25/2016 states address unknown; need due diligence showing efforts to serve notice.</i>) <p style="text-align: center;">~Please see additional page~</p>
		<p>VANICE J. UPTON, sister, is Petitioner and requests appointment as Conservator of the Person and Estate with bond.</p> <p>Court Investigator's Report was filed on 1/27/2016.</p> <p style="text-align: center;">~Please see additional page~</p>	
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	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: LEG	
		Reviewed on: 1/27/16	
		Updates:	
		Recommendation:	
		File 30-Economou	

NEEDS/PROBLEMS/COMMENTS, continued:

3. *Petition* refers in several places to proposed Conservatee's grandson, **DONALD SMITH** (aka **DONNY**). Need his name and address to be listed in Item 11 of *Petition*, and notice to him pursuant to Probate Code 2250(e).
4. *Petition* refers in several places to a daughter of Petitioner, **SUSAN** [*last name unstated*], who appears to be proposed Conservatee's granddaughter. Need full name and address of granddaughter to be listed in Item 11 of *Petition*, and notice to her pursuant to Probate Code 2250(e).

Note: If *Petition* is granted, Court will set status hearing as follows:

- **Tuesday, March 1, 2016 at 9:00 a.m. in Dept. 303 for filing of proof of bond.**

Pursuant Local Rule 7.5, if the document noted above is filed prior to the date listed, the hearing will be taken off calendar and no appearance will be required.

31
 Attorney
 Mother

Ashlynn Astone, Audie Wulf (GUARD/P) Case No. 15CEPR00943
 Cavin, Kenneth M. (for Karen and Wayne Wulf – Paternal Grandparents – Petitioners)
 Wulf, Angela (Pro Per – Mother – Objector)
 Petition for Appointment of Temporary Guardian of the Person

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: Note: This petition is for Audie only. <u>Continued from 1/25/16. See Minute Order for details.</u>		
Cont. from 012516					
<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 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: skc	
				Reviewed on: 1/27/16	
				Updates:	
			Recommendation:		
			File 31- Astone & Wulf		