

(1) Fourteenth and Final Account and Report of Conservator; (2) Petition for Fees, for Termination of Conservatorship Distribution of Assets of Estate and (3) Discharge of Conservator (Prob. C. 1860 & 2620)

DOD: 11-10-10	CALIFORNIA DEPT. OF DEVELOPMENTAL SERVICES , Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		<u>Continued from 11-17-11.</u>
	Account period: 3-1-09 through 11-10-10	<u>As of 1-31-12, nothing further has been filed. The following issues remain:</u>
Cont. from 111711	Accounting: \$34,377.72	<ol style="list-style-type: none"> 1. Probate Code §§ 2631 and 13100 allow liquidation and distribution of <u>personal property only</u> in the manner requested. Real property, including undivided interests, is subject to Probate Code §13151, which requires the mandatory judicial council Petition to Determine Succession to Real Property Form DE-310, inventory and appraisal as of the date of death, and noticed hearing. 2. Petitioner also requests to distribute this asset when there is a Medi-Cal lien on the estate. Need authority. 3. Need Order.
Aff.Sub.Wit.	Beginning POH: \$14,465.02	
<input checked="" type="checkbox"/> Verified	Ending POH: \$16,100.50	
Inventory		
PTC	Account period: 11-11-10 through 6-30-11	
Not.Cred.	Accounting: \$18,405.01	
<input checked="" type="checkbox"/> Notice of Hrg	Beginning POH: \$16,100.50	
<input checked="" type="checkbox"/> Aff.Mail W	Ending POH: \$12,537.04	
Aff.Pub.	(POH consists of cash in the amount of \$554.93 plus an undivided 1/3 interest of a 3/4 interest in real property, a stove, and an air conditioner)	
Sp.Ntc.	Conservator: \$125.00	
Pers.Serv.	Attorney: \$40.00	
Conf. Screen	Petitioner states there is a Medi-Cal claim in the amount of \$108,627.87 and requests that the court authorize payment of the remaining balance of the conservatorship estate on this claim.	
Letters		
Duties/Supp		
Objections		
Video Receipt		
<input checked="" type="checkbox"/> CI Report		
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation	Petitioner prays for an Order:	
FTB Notice	<ol style="list-style-type: none"> 1. Approving, allowing and settling the final account; 2. Terminating the proceedings herein; 3. Authorizing payment of the conservator's and attorney's fees; 4. Authorizing payment of the remaining balance to the Dept. of Health Services as payment in full on the Medi-Cal claim; 5. Authorizing transfer of the house, stove and air conditioner to the Conservatee's sister; and 6. Discharge of Conservator. 	
		Reviewed by: skc
		Reviewed on: 1-31-12
		Updates:
		Recommendation:
		File 1 - Tortorella

(1) Third and Final Account Current and Report of Conservator, (2) Petition for Conservator's Fees for Discharge of Conservator, and for (3) Authority to Liquidate the Estate by Summary Disposition (Prob. C. 1861(a)(1), 1863(c), 2620, 2631(a) & (b), and 2640)

DOD: 9/10/10		CRYSTAL FOREMAN, Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		<u>Account Period: 1/6/10 – 9/10/10</u>	<u>Continued from 11/10/11. Minute Order states: The Court continues the matter to 2/2/12. The Court advises Ms. Foreman that it expects to hear what she has done to create assets for the benefit of the estate or the attorney at the next hearing.</u>
Cont. from 111011			
	Aff.Sub.Wit.	Accounting \$42,977.52	
	Verified	Beginning POH \$32,316.00	
√	Inventory	Ending POH \$29,538.00	
	PTC		
	Not.Cred.		
	Notice of Hrg	<u>Subsequent Account Period: 9/11/10 – 8/2/11</u>	
√	Aff.Mail		
	Aff.Pub.	Accounting \$32,371.21	
	Sp.Ntc.	Beginning POH \$29,538.00	
	Pers.Serv.	Ending POH \$ 0.00	
	Conf. Screen		
	Letters	11/18/03 Conservator \$1,571.66	
	Duties/Supp	Attorney Not requested	
	Objections		
	Video Receipt		
	CI Report	Petitioner requests the Court approve, allow, and settle the Account, as wells as approve the acts of Conservator; confirming Conservator’s commission in the sum of \$1,571.66, for an order discharging the Conservator.	
	9202		
√	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: NRN
			Reviewed on: 1/25/12
			Updates:
			Recommendation:
			File 2 - Shirey

(1) Second and Final Account and Report of Conservator; (2) Petition for Allowance of Compensation to Conservator and Attorney; and (3) for Authority to Sell Personal Property and Retain Proceeds (Prob. C. 1860; 2620; 2623; 2630; 2631; 2942)

DOD: 8/22/11		PUBLIC GUARDIAN , Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from		Accounting - \$ 72,702.51	
	Aff.Sub.Wit.	Beginning POH - \$ 1,553.65	
✓	Verified	Ending POH - \$ 1,150.60	
	Inventory		
	PTC	Subsequent Account Period: 8/23/11-9/21/11	
	Not.Cred.	Accounting - \$6,345.98	
✓	Notice of Hrg	Beginning POH - \$1,150.60	
✓	Aff.Mail w	Ending POH - \$2,441.98 (\$2,248.70 is cash)	
	Aff.Pub.	Conservator - \$2,227.43	
	Sp.Ntc.	(21.54 Deputy hours @ \$96/hr and 17.40 Staff hours @ \$76/hr)	
	Pers.Serv.		
	Conf. Screen	Attorney - \$2,000.00	
	Letters 9/30/03		
	Duties/Supp	Bond fee - \$175.00	
	Objections	Petitioner requests the Court:	
	Video Receipt	1. Find that the conservatorship terminated on 8/22/11, the date of conservatee's death;	
	CI Report	2. Approve, allow, and settle the 2 nd and Final Account and authorize Petitioner and her attorney's requested compensation, as well as the bond fee;	
	9202	3. Order that a lien be imposed against the estate for any unpaid balance of authorized fees and commissions, which includes a \$200.00 lien for fees for Petitioner's 1 st Account; and	
✓	Order	4. Authorize Petitioner to sell deceased conservatee's personal property and retain the proceeds as partial payment of the approved fees and commissions.	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Reviewed by: NRN
Reviewed on: 1/25/12
Updates:
Recommendation:
File 3 - Goodall

(1) Ninth and Final Account and Report of Conservator; (2) Petition for Allowance of Compensation to Conservator and Attorney; (3) Termination of Conservatorship and Distribution [Prob. C. §§ 1861, 2620, 2623, 2630, 2631, 2942]

Age: 74 years	PUBLIC GUARDIAN, Conservator, is Petitioner.		NEEDS/PROBLEMS/COMMENTS:
DOB: 2/29/36			
	Account Period: 10/14/10 – 11/29/11		
Cont. from	Accounting	- \$16,203.88	
Aff.Sub.Wit.	Beginning POH	- \$ 2,059.08	
✓ Verified	Ending POH	- \$ 1,698.68	
Inventory			
PTC			
Not.Cred.	Conservator	- \$592.00	
	(3.0 Deputy hours @ \$96/hr and 4.0 Staff hours @ \$76/hr)		
✓ Notice of Hrg	Attorney	- \$1,000.00	
✓ Aff.Mail w/	(per Local Rule)		
Aff.Pub.			
Sp.Ntc.	Bond fee	- none requested	
Pers.Serv.			
Conf. Screen	<u>Petitioner states:</u>		
Letters 9/30/94	1) She intends to distribute \$500.00 of the cash on hand and the jewelry valued at \$70 to the Conservatee;		
Duties/Supp	2) The estate is depleted and the conservatee's income can be managed by a payee service.		
Objections			
Video Receipt			
CI Report	<u>Petitioner requests the Court:</u>		
9202	<ul style="list-style-type: none"> • Terminate the conservatorship of the estate of the conservatee; • Approve, allow and settle the 9th and Final Account; • Order a lien be imposed against the estate for any unpaid balance of the authorized fees and commissions (which includes lien amounts owed Petitioner and her attorney for the 7th and 8th Accounts); and • Authorize distribution of the balance of the property on hand. 		
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
	Reviewed by: NRN		
	Reviewed on: 1/26/12		
	Updates:		
	Recommendation:		
	File 4 - Missakian		

Atty Kruthers, Heather H (for Petitioner/Conservator Public Guardian)

Atty Wright, Janet L (court appointed for Conservatee)

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

Age: 69 years DOB: 5/31/1942	PUBLIC GUARDIAN, Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 9/22/08 – 4/6/11	1. Conservatee moved from the Sand's Motel to a private home (Anjaleoni Enterprises) in 10/2009. Disbursement Schedule however shows rent paid for both the home (\$1,500.00) and the Sands Motel (680.00) for 10/2009. Need clarification. – Declaration filed 1/30/12 states the Court ordered the PG to find and interim place for the conservatee to live in 2009, and he arranged for her to move into a home in Clovis until the escrow was complete on her Auberry home. The Conservatee refused to move on 10/1/09 even though the house was rented and she had approved of it on a previous visit. The Conservatee would not move until October 25 th .
Cont. from 110111, 120811	Accounting - \$440,374.61 Beginning POH- \$202,469.95 Ending POH- \$252,976.84	2. Conservatee moved from the private home (Anjaleoni Enterprises) to a home purchased for her in Auberry on 2/10/10. Disbursement schedule however shows payments to Anjaleoni Enterprises home for both 2/2010 and 3/2010. Need clarification. – Declaration filed 1/30/12 states the PG was ordered to move the conservatee from the Sands Motel. Given the short notice and the difficulties in working with the conservatee, the numerous places contacted required a one-year lease. Anjaleoni agreed to take her subject to a six month lease. She moved in in October so she was responsible for rent from October to March.
Aff.Sub.Wit.	Conservator - \$16,049.20 (130.05 Deputy hours @ \$96/hr and 46.90 Staff hours @ \$76/hr)	
✓ Verified	Attorney - \$2,500.00 (per Local Rule)	
Inventory	Bond fee - \$861.63 (o.k.)	
PTC	Court fees - \$26.00	
Not.Cred.	Petitioner prays for an Order:	
✓ Notice of Hrg	1. Approving, allowing and settling the second account.	
✓ Aff.Mail W/	2. Authorizing the conservator and attorney fees and commissions	
Aff.Pub.	3. Payment of the bond fee	
Sp.Ntc.	<i>Please see additional page</i>	
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
✓ Objections		
Video Receipt		
CI Report		
9202		
✓ Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 1/30/12
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 5 - Klein

Objection to Second Account Current filed by Conservatee Emmy Klein on 1/17/12. Ms. Klein objects on the grounds that the total amount of costs incurred in relationship to the results obtained on her behalf during the accounting period are excessive, specifically in reference to the following areas:

1. The replacement of Ms. Klein's Senior Helper with Anjaleoni Enterprises, whose charges outweigh the value of the service provided in comparison to the Senior Helper services, resulting in excessive an charge;
2. The total rent paid for the rental residence in Clovis, which Ms. Klein feels was an inappropriate placement, resulting in an excessive charge;
3. The cost of the repairs for the rental residence in Clovis for alleged damages which were charged to Ms. Klein were not reasonable;
4. The cost of the living room furniture purchased for Ms. Klein's Auberry residence was excessive, not supportive of the conservatee's lifestyle and purchased without consultation with the conservatee.

Based on the foregoing the Conservatee requests the Court reduce the fees payable to the Public Guardian from the Conservatee's estate in an amount appropriate to reflect the actual services rendered as justified by the benefit received.

Response to Objections filed on 1/27/12 states:

1. Replacement of Senior Helper: The Anjaleoni helper was more hand on and assistive to the Conservatee. The Senior Helper did not appear to be moving the conservatee in a positive direction. She was living in a very poor environment at the Sands Motel under their supervision.
2. Rent Paid for Clovis Placement: The Consrvatee fails to state why the Clovis placement was inappropriate. Therefore, the Public Guardian is unable to properly respond to this objection.
3. Cost of Repairs at the Clovis Residence: The conservatee and her dog did significant damage to the Clovis home. The dog dug up the yard and broke the sprinklers. The conservatee purportedly plugged up the plumbing. This is not ordinary wear and tear by a tenant.
4. Costs of Living Room Furniture: The conservatee was never cooperative with the Public Guardian Deputy, so she would not consult with him. The owner of Anjaleoni, who ultimately chose the furniture, offered to take the conservatee shopping for furniture, but she would not participate.

Therefore, the Fresno Public Guardian prays for the following:

1. The Court Deny the objections to the account by the conservatee;
2. The Court approve the account and petition as filed.

Needs/Problems/Comments Continued:

3. **Disbursement schedule shows payments for lawn care (\$25.00) and plumbing repairs (\$463.22) while the conservatee was living in the Anjaleoni Enterprises home. Why is the conservatee paying the repairs in a rental home? –**
Declaration filed on 1/30/12 states the conservatee, and upon her allowance, her dog were very destructive while living in the Anjaleoni home. The damage was excessive, beyond normal wear and tear of a tenant. The dog dug up the yard and destroyed the backyard sprinklers. The conservatee purportedly plugged up the plumbing, resulting in property damage. She did this later at her Auberry home.
4. **Disbursement schedule shows a rent deposit for the Anjaleoni Enterprises home of \$1,500.00. Disbursement schedule also shows repairs (\$2,889.17) and carpet cleaning (\$120.00) for the rental property. Was the deposit used to cover any part of the repairs or carpet cleaning? There is no record that the deposit was returned. –**
Declaration filed on 1/30/12 states the deposit was used to clean and prepare the house for a new renter. The amount of cleaning and restoring the property (please see #3 above) was extensive and the cost was not covered by the deposit alone.
5. **Disbursement schedule shows two shopping fees of \$260.00 each paid to Sundari Kendadur (of Anjaleoni Enterprises). Court may require clarification.**
6. **Disbursement schedule shows disbursements for a “home helper” (operated by “Senior Helpers) throughout account period; however there are also disbursements for “private care” from Anjaleoni Enterprises for the months of November 2009, and December 2009 (totaling \$1,716.00 and \$1,584.00, respectively and at much higher rates than Senior Helpers) – need clarification.**
7. **Disbursement schedule shows past due property taxes paid totaling \$578.69. Need clarification.**
8. **Disbursement schedule shows transportations fees for Oct. 2009 (\$150.00), Nov. 2009 (\$225.00) and for Dec. 2009 (\$225.00). Need clarification.**

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

Age: 82 DOB: 03/22/29	PUBLIC GUARDIAN , Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>Note to Judge:</u> Please set a status hearing for the filing of the 3rd account as follows: <ul style="list-style-type: none"> • 14 months if a 1 year account is due or • 26 months if a 2 year accounting is due.
	Account period: 08/07/09 – 8/09/11	
	Accounting - \$311,128.41	
Cont. from	Beginning POH - \$280,093.49	
Aff.Sub.Wit.	Ending POH - \$254,691.41	
✓ Verified	Conservator - \$934.40 (2.45 Deputy hours @ \$96/hr and 9.20 Staff hours @ \$76/hr)	
Inventory	Attorney - \$2,000.00 (per Local Rule)	
PTC	Bond fee - \$50.00 (o.k.)	
Not.Cred.	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.	
✓ Notice of Hrg	Petitioner prays for an Order:	
✓ Aff.Mail w/	1. Approving, allowing and settling the first account;	
Aff.Pub.	2. Authorizing the conservator and attorney fees and commissions;	
Sp.Ntc.	3. Authorizing payment of the bond fee; and	
Pers.Serv.	4. Authorizing petitioner to impose a lien on the estate for any unpaid balances of authorized fees and commissions.	
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
✓ CI Report		
2620(c) n/a		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Reviewed by: JF
Reviewed on: 01/25/12
Updates:
Recommendation:
File 6 - Neitzel

Anita Mosesian (CONS/E)

Bagdasarian, Gary G. (for Elaine J. Mosesian – Granddaughter – Former Conservator – Petitioner)
Kruthers, Heather (for Public Guardian – Current Conservator)

(1) First Account and Report of Conservator and (2) Petition for Attorney's Fees and Costs Reimbursement and (3) Waiver of Conservator's Compensation

Age: 93	<p>ELAINE J. MOSESIAN, granddaughter and former conservator of the estate, is petitioner. Letters issued on 12-18-07 and Resignation was accepted on 3-9-11. Bond is \$40,000.00.</p> <p><i>(The Public Guardian was previously the temporary conservator, and was reappointed as Successor Conservator on 3-9-11.)</i></p> <p>Account period: 12-18-07 through 4-8-11</p> <p>Accounting: \$ 98,307.32 Beginning POH: \$ 0.00 Ending POH: \$ 4,219.74</p> <p>Conservator: Waived per Account/Petition filed 5-18-11; however, Declaration filed 8-12-11 states Conservator does <u>not</u> waive rights to compensation for ordinary services as Conservator.</p> <p>Attorney: \$11,207.20 (itemized)</p> <p>Costs: \$883.00 (filing fees, certified letters, attempted service of process)</p> <p>Bond: \$40,000.00 (<i>insufficient</i>)</p> <p>Petitioner prays for an Order:</p> <ol style="list-style-type: none"> Approving, allowing and settling the account and approving the acts of the conservator; Authorizing attorney's fees and costs. <p>Supplement filed 8-12-11 addresses verification, account statement, veteran status, and state hospital status.</p> <p>Declaration of Atty Bagdasarian filed 9-7-11 requested an additional 60 day continuance to obtain the information. The hearing was continued to 11-17-11.</p> <p>Declaration of Elaine Mosesian filed 1-16-11 states she intends to provide clarification on the items noted in the Probate Examiner Notes and requests a 60-day continuance. Attached are printouts that appear to be lists of the "unknown" distributions (see #6 below).</p> <p style="text-align: center;"><u>SEE PAGE 2</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 7-7-11, 9-8-11, 11-17-11.</u></p> <p style="text-align: center;"><u>SEE PAGE 2</u></p> <hr/> <p>Updates:</p> <p>Contacts: Reviewed 1-26-12</p> <p>Recommendation:</p> <p>Reviewed by: skc</p> <p>File 7 - Mosesian</p>
DOB: 7-13-17		
Cont. from 070711, 090811, 111711		
Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
Inventory		
PTC		
Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJA		
Citation		
FTB Notice		

Declaration of Attorney Bagdasarian filed 1-16-11 states he has attempted to contact Elaine J. Mosesian on several occasions by email for more detail regarding the accounting. Ms. Mosesian provided a list of the “unknown” and “miscellaneous” disbursements (see below).

NEEDS/PROBLEMS/COMMENTS (Continued):

- ~~1. Need account statements per Probate Code 2620. Petitioner two statements: checking end date 4-8-11, and savings end date 12-31-10. This is not in compliance with Probate Code 2620(c)(2).
Supplement filed 8-12-11 states the statements are “filed herewith as a confidential filing;” however, there does not appear to be any confidential filing.~~
2. Receipts Schedule does not reflect the receipt of funds from the Public Guardian pursuant to the Receipt filed 10-7-08 (signed 5-21-08). Need clarification.
Attorney Bagdasarian’s Declaration filed 11-16-11 states he has requested this information from his client via letter but has not received a response.
3. Receipts schedule indicates an “Unknown” receipt for \$2,665.96. Disbursements schedule indicates a “Deposit Returned” for \$3,665.96, plus a \$10.00 “Bank Fee on Returned Item.” Need clarification.
Attorney Bagdasarian’s Declaration filed 11-16-11 states he has requested this information from his client via letter but has not received a response.
4. Receipts schedule indicates “Fresno County Superior Court” for \$2,478.80. Need clarification.
Attorney Bagdasarian’s Declaration filed 11-16-11 states he has requested this information from his client via letter but has not received a response.
5. Disbursements schedule indicates \$3,402.00 to payee “Gary Bagdasarian: Trust Funds to be deposited to offset this amount.” Need clarification. Were these funds paid to Attorney Bagdasarian in violation of Probate Code §2647?
Note: The itemization of attorney’s fees indicates creation of a trust in connection with the stipulation for conservatorship; however, this file does not contain further information regarding a trust. The court may require clarification.
*Attorney Bagdasarian’s Declaration filed 11-16-11 states this amount was paid in connection with work associated with the conservatee’s trust that has been in existence since 1993. (The trust owns her residence.)
The former conservator wrongfully paid this amount from the conservatorship estate and was expected to reimburse the conservatorship estate from trust funds; however, there is no evidence that the funds were repaid.*
6. Disbursements schedule indicates over \$36,000.00 in “unknown” and “withdrawal” disbursements. Need clarification. Examiner notes that most of these items were checks for specific amounts, rather than even withdrawal amounts. Therefore, it is likely that the information is available.
Elaine Mosesian’s Declaration filed 11-16-11 provides a list of items clarifying over \$49,000.00 in disbursements. Examiner notes that most items appear to be appropriate expenditures for the Conservatee (household, etc.)
7. Disbursements schedule indicates varying payment amounts to companies like DirecTV, Comcast, and others. Examiner notes that household payments are typically within the same range on a monthly basis, but here, payments range from \$44.77 to \$475.30. The court may require clarification.

SEE PAGE 3

NEEDS/PROBLEMS/COMMENTS (Continued):

8. Disbursements schedule indicates at least six payments on parking tickets from March through June 2008 in amounts ranging from \$25.00 to \$300.00. Need clarification.
Elaine Mosesian's Declaration filed 11-16-11 states the parking tickets were issued to the conservatee as has a valid driver license.
9. Disbursements schedule indicates at least four bank fees in amounts ranging from \$10.00 to \$34.00. Examiner notes one item on 6-7-10 for a "Deposit Returned" in the amount of \$3,665.96 with an associated fee of \$34.00. Need clarification.
Attorney Bagdasarian's Declaration filed 11-16-11 states he has requested this information from his client via letter but has not received a response.
10. Disbursements schedule indicates numerous line items for "miscellaneous household expenses." The court may require clarification.
Elaine Mosesian's Declaration filed 11-16-11 provides a list of items clarifying over \$49,000.00 in disbursements. Examiner notes that most items appear to be appropriate expenditures for the Conservatee (household, etc.)
11. Petitioner states bond of \$40,000.00 was sufficient; however, based on the accounting, bond should have been at least \$108,138.05 (based on receipts/income during this account period plus cost of recovery).
Attorney Bagdasarian's Declaration filed 11-16-11 states a determination of bond will have to be made based on clarification of the accounting.
12. Petition requests reimbursement for attorney's costs including attempted service of process for Attorney's motion to be relieved as counsel. The court may consider this a cost of doing business or may require further information.
Attorney Bagdasarian's Declaration filed 11-16-11 states the issue of attorney's fees and costs will have to be determined once there is a resolution of the accounting.
13. Notice of Hearing for this account appears to include the bonding company "HCC Surety Group."
Attorney Bagdasarian's Declaration filed 11-16-11 states notice will continue to be provided to the bonding company.
14. Attorney's fee itemization includes \$80.00 for conference with the probate examiner no 10-5-07 regarding the upcoming hearing. This is considered a cost of doing business per Local Rule 7.17.B.
Attorney Bagdasarian's Declaration filed 11-16-11 states this item can be waived.
15. Attorney's fee itemization includes reference to issuance of bond under a "joint control agreement." The court may require clarification.
Attorney Bagdasarian's Declaration filed 11-16-11 states the bonding company required a joint control agreement for the issuance of the bond and with the cooperation of the Public Guardian, Attorney Bagdasarian will attempt to clarify the accounting items described above.
16. Petition filed 5-18-11 states Ms. Mosesian, waives compensation (paragraph 5). However, Declaration filed 8-12-11 states she does not waive ordinary compensation. Need clarification.
Examiner notes that compensation is not requested by this petition or proposed order at this time.

Atty Keeler Jr., William J. (of DAK, for Cindy Snow Henry – Trust Beneficiary – Petitioner)
Atty Klassen, Kenton J. (of DAK, also for Cindy Snow Henry – Trust Beneficiary – Petitioner)
Atty Abrams, Robert C. (of Pascuzzi, Moore & Stoker, for Louis Brosi, Jr. – Trustee)
Atty Jaech, Jeffrey A. (of Caswell Bell, formerly for Louis Brosi, Jr. – Trustee)
Atty Paloutzian, Dirk (of BMJ, formerly for Louis Brosi, Jr. – Trustee)

Notice of Motion and Motion to Compel Performance Under Settlement Agreement

<p>Louis Brosi, Sr. DOD: 8-1-79</p>	<p>CINDY SNOW HENRY, Trust Beneficiary, is Petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
<p>Stella Brosi DOD: 10-29-05</p>	<p>Petitioner states on 3-5-09 the parties reached agreement and the settlement was placed on the record with parties and counsel present. Petitioner seeks to have the court order Louis Brosi III to carry out the acts necessary to partition the property into three parcels anticipated and directed by the settlement.</p>	<p><u>Minute Order 5-10-11:</u> The matter is continued to 7-5-11 to allow Mr. Klassen an opportunity to receive the information from both counsel. Matter also set for status.</p>	
<p>Cont. from 051011, 070511, 082311, 091911 (Status Conf.), 101811, 121511, 010512</p>	<p>Petitioner states the land is still owned jointly by several parties: Louis Brosi, Jr., Doris Brosi, Petitioner Cindy Snow Henry, and her brother Robert Snow; the settlement provided for partition of the property into three parcels.</p>	<p><u>Minute Order 7-5-11:</u> Matter continued to 8-23-11.</p>	
<p>Aff.Sub.Wit.</p>	<p>Petitioner requests that the court compel Louis Brosi III to partition the parcel and pay the associated costs. Petitioner states Louis Brosi III has had more than two years, but to Petitioner’s knowledge has made no effort to perform. Petitioner states that upon partition, the property can be used to earn income, provide collateral, or be sold for Petitioner’s benefit or to pay off debts against the property.</p>	<p><u>Minute Order 8-23-11:</u> Mr. Franco requests additional time to file a motion. The Court directs Mr. Franco to file his motion by 9-27-11. The Court sets a hearing on the pending motion for 10-18-11.</p>	
<p>Verified</p>	<p>Petitioner seeks relief to prevent the diminution of value of the property to be received by Petitioner. Petitioner states that during the past two years, what Louis Brosi III has effectively done by his failure to act or act in good faith is to run up interest charges against Petitioner and/or her property. Petitioner alleges that he has intentionally failed to act in good faith and his true intent is to “steal” the property from Petitioner by his inaction.</p>	<p>Note: No motion has been filed.</p>	
<p>Inventory</p>	<p>Petitioner requests that the court order Louis Brosi III to take those actions necessary to complete the partition described in the settlement agreement and to present to Petitioner within 120 days the documents necessary to implement the division.</p>	<p><u>Minute Order 10-18-11:</u> Mr. Franco informs the Court that Mr. Abrams will be substituting out as counsel. Mr. Franco further advises that Mr. Zangle is out of the country. The Court continues the matter to 12-15-11 and vacates the 11-14-11 hearing date.</p>	
<p>PTC</p>	<p>Louis Brosi, Jr.’s Opposition filed 4-28-11 states new issues have arisen since settlement.</p>	<p><u>Minute Order 12-15-11 (Motion to Compel):</u> Mr. Franco informs the Court that an appraisal should be done by the end of January. Matter continued to 1-5-12.</p>	
<p>Not.Cred.</p>	<p>SEE PAGE 2</p>	<p><u>Minute Order 12-15-11 (Status of Motion from 8-23-11):</u> Mr. Franco informs the Court that they have filed an acceptance of the creditor’s claim and are ready to proceed.</p>	
<p>Notice of Hrg</p>		<p><u>Minute Order 1-5-12:</u> Mr. Franco informs the Court that he has not received anything from Cindy Snow Henry’s counsel. The Court sets the matter for an Order to Show Cause on 2-2-12. The Court orders Louis Brosi, III, Louis Brosi, Jr., and Cindy Snow Henry to be present on 2-2-12. The Court authorizes Ms. Henry to appear via conference call. The Court indicates for the record that it will be expecting an answer at the next hearing as to why George Zangle has not been paid. See OSC (Page 8B).</p>	
<p>Aff.Mail</p>		<p>Updates:</p>	
<p>Aff.Pub.</p>		<p>Contacts: Reviewed 1-31-12</p>	
<p>Sp.Ntc.</p>		<p>Recommendation:</p>	
<p>Pers.Serv.</p>		<p>Reviewed by: skc</p>	
<p>Conf. Screen</p>		<p>File 8A - Brosi</p>	
<p>Letters</p>			
<p>Duties/Supp</p>			
<p>Objections</p>			
<p>Video Receipt</p>			
<p>CI Report</p>			
<p>9202</p>			
<p>Order</p>			
<p>Aff. Posting</p>			
<p>Status Rpt</p>			
<p>UCCJEA</p>			
<p>Citation</p>			
<p>FTB Notice</p>			

Atty Keeler Jr., William J. (of DAK, for Cindy Snow Henry – Trust Beneficiary – Petitioner)
Atty Klassen, Kenton J. (of DAK, also for Cindy Snow Henry – Trust Beneficiary – Petitioner)
Atty Abrams, Robert C. (of Pascuzzi, Moore & Stoker, for Louis Brosi, Jr. – Trustee)
Atty Jaech, Jeffrey A. (of Caswell Bell, formerly for Louis Brosi, Jr. – Trustee)
Atty Paloutzian (of BMJ, formerly for Louis Brosi, Jr. – Trustee)

Notice of Motion and Motion to Compel Performance Under Settlement Agreement**Summary (Continued):**

Louis Brosi, Jr.'s Opposition filed 4-28-11 states new issues have arisen since settlement:

- In addition to the partition, the settlement required that Petitioner's parcel would secure three deeds of trust with interest only payable quarterly by Petitioner and all due in five years, including:
 - Note secured by 1st deed of trust payable to Louis Brosi III for \$117,000.00
 - Note secured by 2nd deed of trust payable to Louis Brosi, Sr., and Doris Brosi for \$50,000.00
 - Note secured by 3rd deed of trust payable to Louis Brosi III for 1/3 of the partition costs, capped at \$30,000.00. (Louis Brosi III was to front the costs for the parcel maps.)
- Petitioner has failed to make payments on any of the notes to date.
- Respondent is informed and believes that Louis Brosi III does not have the financial ability to front the costs as originally anticipated.
- The \$30,000.00 cap on Petitioner's note for 1/3 of the cost of the maps is insufficient to cover her 1/3 share.
- There are required use easements and road and other public dedications along Chestnut that should be excluded from the gross parcel prior to determining the size of each of the three parcels.
- The trust has no funds and no income. Louis Brosi, Jr., and his wife Susan Brosi have been advancing personal funds annually, and Louis Brosi, Jr., is not receiving trustee fees for administering the trust.

Respondent concludes that based on Petitioner's non-performance and non-compliance with this court's order, her motion to compel should be denied.

Respondent requests the court order mediation to resolve the details of the new issues.

Minute Order: Mr. Franco informs the Court that he has not received anything from Cindy Snow Henry's counsel. The Court sets the matter for an Order to Show Cause on 2-2-12. The Court orders Louis Brosi, III, Louis Brosi, Jr., and Cindy Snow Henry to be present on 2-2-12. The Court authorizes Ms. Henry to appear via conference call. The Court indicates for the record that it will be expecting an answer at the next hearing as to why George Zangle has not been paid. **See OSC (Page 8B)**

(1) Second Account Current and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney and (3) for Dispensation of Further Accounts [Prob. C. §§ 2620; 2623; 2628(b); 2640; 2942]

Age: 67 DOB: 9/22/1944	PUBLIC GUARDIAN , Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 10/28/09 – 10/27/11	Note to Judge: If future accountings are not dispensed with, please set a status hearing for the filing of the third account
	Accounting - \$43,660.86	• 14 months if a one year accounting is due, or
	Beginning POH - \$1,603.41	• 26 months if a two year accounting is due
	Ending POH - \$1706.15	
Cont. from	Conservator - \$1,679.20 (11.95 Deputy hours @ \$96/hr and 7.00 Staff hours @ \$76/hr)	
Aff.Sub.Wit.	Attorney - \$2,000.00 (per Local Rule)	
✓ Verified	Bond fee - \$50.00 (o.k.)	
Inventory	Petitioner requests 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.	
PTC	Petitioner states that the conservatee’s estate meets the criteria of Probate Code §2628(b) for dispensation of further accounts and requests that further accounts be dispensed with.	
Not.Cred.	Petitioner prays for an Order:	
✓ Notice of Hrg	5. Approving, allowing and settling the first account;	
✓ Aff.Mail w/	6. Authorizing the conservator and attorney fees and commissions;	
Aff.Pub.	7. Payment of the bond fee;	
Sp.Ntc.	8. Authorizing petitioner to impose a lien on the estate for any unpaid balances of authorized fees and commissions; and	
Pers.Serv.	9. Dispensing with future accountings.	
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
✓ CI Report		
2620(c) n/a		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 01/26/12
		Updates:
		Recommendation:
		File 9 - Franklin

Amended First and Final Account, Report of Administrator and Petition for Dismissal of Probate Proceeding

		<p>LOUIS C. BROSI, III, brother and Administrator with full IAEA without bond, is Petitioner.</p> <p>Account period: 5-8-08 through 3-30-11</p> <p>Accounting: \$ 1,042,500.00 Beginning POH: \$ 1,042,500.00 Ending POH: \$ 0.00</p> <p>Petitioner states the estate is insolvent and requests that the court dismiss this probate action.</p> <p>Petitioner states:</p> <ul style="list-style-type: none"> • 15 creditor's claims were filed totaling \$272,306.96. No creditors have been paid; all claims were rejected. <p><i>Update: On 12-13-11, Petitioner filed an Allowance of the California State Board of Equalization's Claim of \$121,848.06.</i></p> <ul style="list-style-type: none"> • Inventory and Appraisal Partial No. 1 reflects Decedent's 50% interest in HB Partners LLC valued at \$282,500.00. • Inventory and Appraisal Partial No. 2 reflects Decedent's interest in two parcels of real property at Alluvial and Chestnut in Fresno valued at \$760,000.00. • Inventory and Appraisal Partial No. 3 reflects Decedent's 100% interest in Tommy Rock Landscaping and Nursery Supplies, Inc., valued at \$0.00. • The LLC owned real property on McCall in Selma that carried a note for \$240,000.00. The estate and the LLC's other partner could not afford the monthly payments or the upcoming balloon payment, so the McCall property was transferred to a third party for the amount of the debt to avoid foreclosure. At the time of the transfer, the estate was in default of the note for over \$56,000.00. • The Decedent's interest in the Alluvial property was challenged in a civil action and the settlement resulted in the estate being divested of Decedent's interest in the property without reimbursement or consideration. • The corporation had not paid rent to the property owners (the beneficiaries herein) since Decedent's death; the nursery inventory was abandoned and much has already died. Other stock was taken by the landlord and used to offset unpaid rent once the property and stock were abandoned by the corporation and estate. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: The California Attorney General filed a Notice of Pendency of Action regarding a rejected creditor's claim. Court records indicate a dismissal was filed.</p> <p>Minute Order 8-23-11: Counsel [Paul Franco for Administrator] advises the Court that the Moxley matter [Opposition by Creditor McKenzie Farms] is gone, and the only issue that is being dealt with is the issue regarding the Attorney General. Counsel further advises that he has been trying to reach a resolution with the Attorney General. Matter continued to 10-18-11. (The matter was later continued to 12-15-11 and 1-5-12.)</p> <p>As of 1-31-12, the following issues remain:</p> <ol style="list-style-type: none"> 1. Decedent's 100% interest in the corporation is valued at \$0.00 and Petitioner states that the stock died and was abandoned after Decedent's death; however, Examiner notes that the appraisal should reflect the value as of the Decedent's date of death, and any abandonment or disposition after that date may be considered a loss to the estate. Need clarification. 2. Petitioner states the McCall property was transferred to a third party to avoid foreclosure. The court may require clarification and may consider this action an unauthorized distribution. 3. Petitioner refers to Decedent's vehicles that were returned to creditors to satisfy claims; however, no vehicles were inventoried. If the vehicles were part of the corporation, their values would have been reflected in that appraisal. Further, such losses are not reflected in any schedules. Need clarification.
DOD: 5-8-08			
Cont. from 071211, 082311, 101811, 121511, 010512			
<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	W/O	
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	X	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

SEE PAGE 2

Amended First and Final Account, Report of Administrator and Petition for Dismissal of Probate Proceeding

SUMMARY (Continued):

- The corporation was involved in litigation to recover assets that were allegedly taken from the corporation. Minimal property was recovered. Further, the corporation was audited by the State Board of Equalization and charged \$142,991.59 for unpaid sales tax. "In any event, the corporation is insolvent and does not anticipate the recovery of any significant assets which would change this."
- The Decedent's truck was returned to the creditor, Ford Motor Company, to resolve that debt. Other finance creditors had their property returned to them, such as bobcats and tractors, to satisfy their claims.
- No assets remain and accounting has been waived by the beneficiaries.

Petitioner prays for an Order that the probate be dismissed in its entirety.

Notice of Pendency of Action filed 6-20-11 by Attorney General Kamala Harris states that on 6-13-11, the California State Board of Equalization filed a complaint on the Creditor's Claim after its rejection in this probate case as Fresno Superior Court Case 11CECG02043. There is a court date in that matter set for 10-24-11.

Examiner notes that Court records indicate a dismissal was filed.

Minute Order 10-18-11: Mr. Franco informs the Court that Mr. Abrams will be substituting out as counsel. Mr. Franco further advises that Mr. Zangle is out of the country. The Court continues the matter to 12/15/11 and vacates the 11/14/11 hearing date. Continued to 12/15/11.

Examiner notes that this item appears to be a reference to an appraisal for the related trust case, not this estate case.

Age:		<p>TERESA GOODING, daughter, was appointed as Administrator of the Estate with limited IAEA powers, subject to placement of Estate cash into a blocked account, on 2/2/11. Letters of Administration issued 2/3/11.</p> <p><i>Receipt and Acknowledgement of Order for the Deposit of Money into Blocked Account</i> was filed 3/1/11.</p> <p>At the 2/2/11 hearing, this Court set the instant matter for status hearing on 1/26/12, and set a status hearing on the <i>Inventory & Appraisal</i> for 6/2/11.</p> <p>Petitioner filed a final <i>Inventory & Appraisal</i> on 5/9/11, showing an Estate value of \$96,195.14. Also on 5/9/11, Petitioner filed a <i>Reappraisal for Sale</i> showing an Estate value of \$94,328.14.</p> <p><u>Petitioner has not filed a First Account or Petition for Final Distribution.</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. <u>Need First Account or Petition for Final Distribution.</u></p>
DOD:			
Cont. from			
Aff.Sub.Wit.			
Verified			
√ Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters	2/3/11		
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt	X		
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: NRN</p> <p>Reviewed on: 1/26/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11 - Sanchez</p>	

Verified Report of Guardian and Petition for Approval of First Account and (2) for Attorney Fees

Age: 3 DOB: 07/16/08	TERI L. JACKSON, Guardian, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Accounting period: 10/12/10 – 10/11/11	
	Accounting - \$749,076.63	
Cont. from	Beginning POH - \$746,343.92	
Aff.Sub.Wit.	Ending POH - \$747,076.63	
✓ Verified	Guardian - waived	
Inventory	Attorney - \$2,000.00	
PTC	(per Local Rule)	
Not.Cred.	Petitioner prays for an order:	
✓ Notice of Hrg	1) Approving, allowing and settling the first account;	
✓ Aff.Mail w/	2) Authorizing the payment of \$2,000.00 to Childs Law Group, PLC for legal services rendered to be paid from blocked account at Bank of the Sierra.	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report n/a		
✓ 2620(c)		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	Reviewed by: JF	
	Reviewed on: 01/26/12	
	Updates: 01/31/12	
	Recommendation:	
	File 12 - Pelley	

Petition for Order Fixing and Allowing Attorney's Fees and Costs

Age:	<p>LEIGH BURNSIDE, of Dowling Aaron & Keeler and counsel for Conservatee Esther F. Herman, is Petitioner.</p> <p>The Public Guardian was Conservator, was appointed Conservator of the Person and Estate on 2/28/11.</p> <p>Petitioner states:</p> <ol style="list-style-type: none"> At the 12/28/10 Court hearing on Petition for Temporary Conservator, Judge Wayne Ellison ordered a substitution of counsel whereby Deborah K. Boyett was relieved from further services and terminated as the Conservatee's court-appointed legal counsel and Heather Mardel Jones of Petitioner's firm (Dowling, Aaron & Keeler), was substituted in as legal counsel. Attorney Heather Mardel Jones is no longer employed by Dowling, Aaron & Keeler. Petitioner Burnside has rendered legal services to protect Conservatee's interest in the Conservatorship proceeding during the period of December 20, 2010 through November 22, 2010, and included in part the following: <ol style="list-style-type: none"> Meeting and conferring with proposed Conservatee and advising her regarding the conservatorship proceeding and her rights in the proceeding; Review and analysis of temporary and general petitions for conservatorship, and all related pleadings; Correspondence with court-appointed attorney for Conservatee regarding estate planning matters and review and analysis of Conservatee's estate planning documents; Correspondence and meetings with Attorney Rindlisbacher, opposing counsel, regarding the conservatorship proceedings; Confer with Conservatee's daughter regarding the unauthorized use of Conservatee's bank accounts; Prepare for and attend hearing on temporary petition and request appointment of the Fresno County Public Guardian as temporary conservator; Prepare, serve and file objection to petition for appointment of Conservator; discuss settlement with client and opposing counsel; Review court investigator report; Attend hearing on appointment of Conservator and confer with Public Guardian, County Counsel, opposing counsel, Conservatee's daughter, and client regarding the same; Review and analyze Atty Boyett's petition for fees. Per Petition and Petitioner's Declaration, requested fees total \$6,540.50 and costs total \$790.00, for a total of \$7,330.50. Petitioner is advised that the Conservatorship estate is worth approximately \$327,000.00 (approximately \$127,000 in personal property and \$200,000 real property). <p>Petitioner requests the Court direct the Public Guardian, Conservator, to pay Petitioner's law firm the sum of \$7,330.50 for legal services rendered, and costs incurred, from 12/20/10 through 11/22/11.</p>		<p>NEEDS/PROBLEMS/COMMENTS:</p>
DOD:			
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 checked="" 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			

Atty Hurlbutt, James P., sole practitioner of Visalia (for Petitioner Brian D. Rodrigues)

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

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;">CONTINUED TO 2/22/2012 Per Attorney Hurlbutt's Request</p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LEG
		Reviewed on: 1/27/12
		Updates:
		Recommendation:
		File 14A – Rodrigues

Atty Hurlbutt, James P., sole practitioner of Visalia (for Petitioner Brian D. Rodrigues)

Request for Order of Substituted Judgment Pursuant to Probate Code Section 2580, et seq.

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED TO 2/22/2012 Per Attorney Hurlbutt's Request</p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LEG
		Reviewed on: 1/27/12
		Updates:
		Recommendation:
		File 14B - Rodrigues

**Petition for Probate of Will and for Letters Testamentary; Letters of Administration
 (Prob. C. 8002, 10450)**

DOD: 10/22/11	MICHELLE SCOTT , daughter, is Petitioner, and requests appointment as Administrator with Will annexed, with bond set at \$165,000.00.	NEEDS/PROBLEMS/COMMENTS:
Cont. from		
<input checked="" type="checkbox"/> Proof of Holo Ins.	Full IAEA – ok	
<input checked="" type="checkbox"/> Verified	Holographic Will dated 06/10/11 and Codicil dated 06/10/11.	
Inventory		
PTC		
Not.Cred.	Residence: Fresno Publication: The Business Journal	
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail w/	Estimated Value of the Estate:	
<input checked="" type="checkbox"/> Aff.Pub.	Personal property - \$150,000.00	
Sp.Ntc.	Annual income - 15,000.00	
Pers.Serv.	Total - \$165,000.00	
Conf. Screen		
<input checked="" type="checkbox"/> Letters	Probate Referee: RICK SMITH	
<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		
		Reviewed by: JF
		Reviewed on: 01/27/12
		Updates:
		Recommendation: SUBMITTED
		File 15 - Scott

Petition for Appointment of Temporary Guardianship of the Person

Age: 8	<p><u>GENERAL HEARING 03/19/12</u></p> <p>TERESA RIOS, paternal grandmother, is Petitioner.</p> <p>Father: GENE A. RIOS – <i>consent and waiver of notice filed 01/17/12</i></p> <p>Mother: RAQUEL RIOS – <i>personally served 01/24/12</i></p> <p>Paternal grandfather: ALEX RIOS – <i>deceased</i></p> <p>Maternal grandfather: UNKNOWN</p> <p>Maternal grandmother: IRMA GONZALES</p> <p>Sibling: Gene A. Rios, Jr. (5)</p> <p>Petitioner states that the minor lived with her for the past 4 years and petitioner has provided for all of her needs, enrolled her in school near her home and enrolled her in dance classes. The minor’s mother recently removed her from petitioners home and has not allowed petitioner contact with the minor. Petitioner states that the mother and maternal grandmother have been abusive to the minor in the past, threatening to burn her hand on the stove if she told petitioner anything about what goes on while in her mother’s care. Petitioner states that Tayler has witnessed people growing, cultivating, and smoking marijuana at the maternal grandmother’s home and that there are illegal aliens living in the maternal grandmother’s converted garage and Petitioner is concerned for her granddaughter’s well-being while in her mother and maternal grandmother’s care. Petitioner further alleges that the mother was stealing and selling prescription diet pills from the doctor that she worked for. Petitioner states that the father is on parole and is not able to care for the minor, but consents to her having guardianship. Petitioner states that temporary guardianship is necessary to protect the minor, as she is fearful that the mother and maternal grandmother will cause physical harm to the minor.</p>	NEEDS/PROBLEMS/COMMENTS:
DOB: 06/18/03		
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<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"/> 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: 01/27/12</p> <p>Updates: 01/31/12</p> <p>Recommendation:</p> <p>File 16 - Rios</p>	

Age:		NEEDS/PROBLEMS/COMMENTS: <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Second and Final Account was approved on 08/17/11.</p>
DOD:		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 01/27/12
		Updates:
		Recommendation:
		File 17 - Simmons

Petition for Visitation

Age: 6	<p>MARIA BAUTISTA, paternal grandmother, appointed Guardian on 05/08/06, is Petitioner.</p> <p>Petitioner requests to terminate the visitation between Phillip and his father. Petitioner states that the last time Phillip returned from visits with his father he had bruises on his behind and legs. Petitioner states that Phillip told her that both his father and his father's girlfriend hit him. Petitioner states that the only reason the father wants Phillip is to avoid paying child support. Petitioner states that the father has stated to her that if she stops the child support, she can have Phillip and he won't bother her anymore. Petitioner further states that Phillip reports that his father and his girlfriend smoke and drink in Phillips presence and that his father drives when he is drunk. Petitioner states that she believes the father's girlfriend's mother lives with them and that she is a drug user. Petitioners states that she does not feel that Phillip is safe at his father's house.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of service by mail of <i>Notice of Hearing</i> with a copy of the <i>Petition for Visitation</i> on: <ul style="list-style-type: none"> - Felipe Bautista (father) - Vanessa Nicole Noriega (mother) 	
DOB: 08/05/05			
Cont. from			
Aff.Sub.Wit.			
✓ Verified			
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			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
	Reviewed by: JF		
	Reviewed on: 01/27/12		
	Updates:		
	Recommendation:		
	File 18 - Bautista		

Probate Status Hearing Re: Filing of the Petition for Final Distribution

Age:		NEEDS/PROBLEMS/COMMENTS: <p style="text-align: center;">OFF CALENDAR</p> <p>Petition for Final Distribution was approved on 07/27/11.</p>
DOD:		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
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Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 01/27/12
		Updates:
		Recommendation:
		File 19 - Rowe