



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) First and Final Report of Administration of Estate by Wayne A. Fisher as Administrator, and (2) Petition for Its Settlement and (3) Final Distribution on Waiver of Account and (4) for Approval of Statutory Compensation to Personal Representative and Attorneys' Fees for Ordinary Services

DOD: 3/9/2010		<p>WAYNE A. FISHER, Administrator, is petitioner.</p> <p>Accounting is waived.</p> <table border="0"> <tr> <td>I & A</td> <td>-</td> <td>\$198,318.65</td> </tr> <tr> <td>POH</td> <td>-</td> <td>\$175,212.97</td> </tr> <tr> <td>Administrator (statutory)</td> <td>-</td> <td>\$6,949.56</td> </tr> <tr> <td>Attorney (statutory)</td> <td>-</td> <td>\$6,649.56</td> </tr> <tr> <td>Closing</td> <td>-</td> <td>\$5,000.00</td> </tr> </table> <p>Distribution, pursuant to intestate succession, is to:</p> <p>Bradford Fisher - 1/3 interest in real property located at 347 Coolidge Street, Coalinga and \$24,437.95</p> <p>Wayne Fisher – 25% interest in real property located at 434 University Street, Coalinga, 50% interest in 1998 Dodge Pickup, 50% interest in 1988 Scott Trailer, 1/3 interest in real property located at 347 Coolidge Street, Coalinga and \$1,437.96.</p> <p>William Fisher - 1/3 interest in real property located at 347 Coolidge Street, Coalinga and \$24,437.95.</p>	I & A	-	\$198,318.65	POH	-	\$175,212.97	Administrator (statutory)	-	\$6,949.56	Attorney (statutory)	-	\$6,649.56	Closing	-	\$5,000.00	NEEDS/PROBLEMS/COMMENTS:
I & A	-		\$198,318.65															
POH	-		\$175,212.97															
Administrator (statutory)	-		\$6,949.56															
Attorney (statutory)	-		\$6,649.56															
Closing	-		\$5,000.00															
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		<table border="1"> <tr> <td>Reviewed by: KT</td> </tr> <tr> <td>Reviewed on: 1/31/12</td> </tr> <tr> <td>Updates: SUBMITTED</td> </tr> <tr> <td>Recommendation:</td> </tr> <tr> <td>File 1 - Fisher</td> </tr> </table>	Reviewed by: KT	Reviewed on: 1/31/12	Updates: SUBMITTED	Recommendation:	File 1 - Fisher											
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Updates: SUBMITTED																		
Recommendation:																		
File 1 - Fisher																		

(1) First and Final Report of Administration of Estate by Wayne A. Fisher as Administrator, and (2) Petition for Its Settlement and (3) Final Distribution on Waiver of Account and (4) for Approval of Statutory Compensation to Personal Representative and Attorneys' Fees for Ordinary Services

DOD: 3/9/2010		<p>WAYNE A. FISHER, Administrator, is petitioner.</p> <p>Accounting is waived.</p> <p>I & A - \$115,318.62 POH - \$175,212.97</p> <p>Administrator (statutory) - \$4,459.55 Attorney (statutory) - \$4,459.55 Closing - \$5,000.00</p> <p>Distribution, pursuant to intestate succession, is to:</p> <p>Bradford Fisher - \$26,097.96</p> <p>Wayne Fisher – 25% interest in real property located at 434 University Street, Coalinga, 50% interest in 1998 Dodge Pickup, 50% interest in 1988 Scott Trailer and \$3,097.96</p> <p>William Fisher - \$26,097.96</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
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		Reviewed by: KT		
		Reviewed on: 1/31/12		
		Updates: SUBMITTED		
		Recommendation:		
		File 2 - Fisher		

First and Final Account and Report of Conservator; Petition for Allowance of Compensation to Conservator and her Attorney; and Distribution (Prob. C. 1860, 2620, 2623, 2630, 2942)

DOD: 9/13/2011	PUBLIC GUARDIAN , Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 2/1/2010 – 9/13/2011	
	Accounting - \$21,372.64	
Cont. from	Beginning POH - \$ 9,864.00	
Aff.Sub.Wit.	Ending POH - \$15,508.64	
<input checked="" type="checkbox"/> Verified	Subsequent account period: 9/14/2011-10/24/2011	
Inventory	Accounting - \$18,796.64	
PTC	Beginning POH - \$15,508.64	
Not.Cred.	Ending POH - \$14,471.64	
<input checked="" type="checkbox"/> Notice of Hrg	Conservator - \$1,730.00 (15.25	
<input checked="" type="checkbox"/> Aff.Mail W/	Deputy hours @ \$96/hr and 3.50 Staff hours @ \$76/hr)	
Aff.Pub.	Attorney - \$2,000.00 (per Local Rule)	
Sp.Ntc.	Bond fee - \$85.50 (o.k.)	
Pers.Serv.	Court fees - \$421.00	
Conf. Screen	The estate of the deceased conservatee will be administered by the Public Administrator pursuant to Probate Code §7660, which is without court supervision.	
Letters	Petitioner prays for an Order:	Reviewed by: KT
Duties/Supp	1. Approving, allowing and settling the first and final account;	Reviewed on: 2/1/12
Objections	2. Authorizing the conservator and attorney fees and commissions;	Updates:
Video Receipt	3. Payment of the bond and court fees;	Recommendation:
CI Report	4. Distributing the remaining property on hand to the Public Administrator as personal representative of the estate pursuant to Probate Code §7660.	File 3 - Close
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJA		
Citation		
FTB Notice		

(1) Waiver of Accounting and (2) Petition for Final Distribution and (3) for Allowance of Compensation (Prob. C. 16100)

DOD: 12-14-10	LEO E. STEINBOCK , Executor with full IAEA without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Accounting is waived.	<u>Minute Order 11-15-11</u> : Counsel advises the Court that Gary Bethke is the CFO and agent for process of service for the Diocese. The Court continues the matter to 1/17/12. If the document(s) is filed by 1/17/12, the matter may be approved without further hearing.
Cont. from 111511, 011712	I&A: \$83,919.37 POH: \$83,919.37	<u>Minute Order 1-17-12</u> : No appearances. Matter continued to 2-7-12.
Aff.Sub.Wit.		<u>As of 1-31-12, nothing further has been filed. The following issues remain:</u>
✓ Verified	Executor (Statutory): \$3,356.77	1. Need Notice of Hearing and proof of service of Notice of Hearing on Diocese of Fresno at least 15 days prior to the hearing per Probate Code §11000.
✓ Inventory	Attorney (Statutory): <i>Not addressed</i>	<i>Note: The Diocese signed a waiver of account, but did not include waiver of notice of the hearing.</i>
✓ PTC		2. Petitioner does not address attorney's fees. Are attorney's fees waived?
✓ Not.Cred.	Distribution pursuant to Decedent's will:	3. Need Order.
Notice of Hrg	Diocese of Fresno: \$80,562.60	<i>Examiner notes: The petition states that after payment of the \$80,562.60 to the Diocese, the residue shall pass to Petitioner; however, the will appears to specify that <u>all money</u> goes to the Diocese and <u>other residue</u> (no personal effects or property were inventoried) goes to Petitioner. The order should reflect the appropriate language.</i>
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
✓ 9202		
Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 1-31-12
UCCJEA		Updates:
Citation		Recommendation:
✓ FTB Notice		File 4 - Steinbock

(1) Waiver of Accounting and Petition for Final Distribution Under Will and (2) for Allowance of Statutory Attorney's Fees (Prob. C. 11640, 10810)

DOD: 12/31/10	PHYLLIS FITZGERALD and SUSAN KISSINGER, Co-Executors, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:
	Accounting is waived.	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.	I & A - \$79,393.08	
<input checked="" type="checkbox"/> Verified	POH - \$79,393.08	
<input checked="" type="checkbox"/> Inventory	Executors - waived	
<input checked="" type="checkbox"/> PTC	Attorney - \$3,175.72 (statutory)	
<input checked="" type="checkbox"/> Not.Cred.	Closing - \$500.00	
<input checked="" type="checkbox"/> Notice of Hrg	Distribution, pursuant to decedent's will, is to:	
<input checked="" type="checkbox"/> Aff.Mail w/o	Phyllis E. Fitzgerald and Susan R. Kissinger, as Successor Co-Trustees of the Floyd E. Kelley and M. Louise Kelley Revocable Living Trust Agreement, dated August 19, 1996 - \$75,717.36	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters 08/01/11		
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: 01/31/12
		Updates:
		Recommendation: SUBMITTED
		File 5 - Kelley

Atty Walters, Jennifer L. (for Ronald Markarian – spouse)
Atty Harris, Richard A. (for Pamela Milam – daughter/Petitioner)
Atty Sanoian, Joanne (court appointed for Conservatee)

Petition for Enforcement of Support of Conservatee Spouse from Community Property

Age: 78	PAMELA S. MILAM , daughter and Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
DOB: 07/17/33		
	Petitioner filed petitions for appointment of Temporary and General Conservator of the Person and Estate of Benny Markarian on 09/02/11.	<p>1. Notice of Hearing lists the hearing date as 02/09/12 instead of 02/07/12. Need revised Notice of Hearing with proof of service by mail reflecting the correct hearing date of 02/07/12.</p> <p>Note: A new Petition for Division of Community Property and for Enforcement of Support of Conservatee Spouse from Community Property was filed by Petitioner on 01/19/12 and is set for hearing on 03/08/12.</p>
Cont. from	Ronald Markarian, the conservatee’s husband, filed petitions for appointment of Temporary and General Conservator of the Person and Estate of Benny Markarian on 09/01/11.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory	Petitioner was appointed Temporary Conservator of the Person Ex Parte on 09/07/11 and was appointed as permanent conservator of the Person on 11/10/11.	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Petitioner states that the Conservatee and her spouse, Ronald Markarian, have community property consisting of \$300,000.00 in liquid assets that is currently managed by Ronald Markarian.	
<input checked="" type="checkbox"/> Aff.Mail	w/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.	Petitioner previously obtained an order for support relating to the care of the Conservatee; however, she has not sought an order for reimbursement of fees paid to her attorneys. Currently, the fees total \$16,916.75 through October 31, 2011. The fees have been paid from a joint account held in the name of the Petitioner and the Conservatee. On 11/29/11, Petitioner requested reimbursement from Ronald Markarian from community funds for the attorney’s fees and costs, but has received no response from Mr. Markarian.	
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	Petitioner alleges that Ronald Markarian has paid his own legal fees from community assets and asserts that it would be incongruous and inequitable to allow Ronald Markarian to use community assets to oppose activities of the conservator, but not allow those same funds to establish the conservatorship or pursue associated legal activity.	
<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	Should Ronald Markarian refuse to comply with any orders made pursuant to this petition or Probate Code §§ 3080 – 3092, Petitioner requests that the community property be divided and the portion found to belong to the Conservatee be turned over to the conservator of her estate, as provided for by Probate Code § 3089.	
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice	<p>Petitioner prays for an order:</p> <ol style="list-style-type: none"> 1) Requiring Ronald Markarian to reimburse to the Conservatee fees paid to Wild, Carter & Tipton of \$16,916.75; and 2) For other relief the court deems proper, including an order dividing the community property and turning over the Conservatee’s community interest to the Conservator of the Estate, should Ronald Markarian refuse to comply with any order made pursuant to Probate Code §§ 3080 – 3092. 	
		<p>Reviewed by: JF</p> <p>Reviewed on: 01/31/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7 - Markarian</p>

8 Selina Pasillas (CONS/PE)
 Atty Kruthers, Heather H. (for the Public Guardian – Petitioner)
 Atty Wright, Janet L. (Court-appointed for Conservatee – Objector)
 Atty Neilson, Bruce (for Ruth Ann Hill – Daughter)

Case No. 11CEPR01030

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

Age: 86 years	<p align="center"><u>TEMPORARY LETTERS EXPIRE 1/3/12</u></p> <p>PUBLIC GUARDIAN is Petitioner and requests appointment as Conservator of the Person and Estate without bond. Temporary Conservatorship of the person and estate was granted <i>ex parte</i> on 11/17/11 and at the hearing on the Temporary Petition on 11/30/11.</p> <p><u>Note: On 11/28/11, the Court appointed Janet Wright as attorney for the Conservatee.</u></p> <p><u>Estimated Value of the Estate:</u></p> <table> <tr> <td>Personal property</td> <td>-</td> <td>\$ 129.24</td> </tr> <tr> <td>Annual income</td> <td>-</td> <td>\$5,736.00</td> </tr> <tr> <td>Total</td> <td></td> <td>\$5,865.24</td> </tr> </table> <p>Declaration of Sue Yie, M.D., was filed on 11/16/11.</p> <p>Voting Rights Affected</p> <p>PROBATE REFEREE: STEVEN DIEBERT</p> <p align="center"><u>*Please see attached pages</u></p>	Personal property	-	\$ 129.24	Annual income	-	\$5,736.00	Total		\$5,865.24	NEEDS/PROBLEMS/COMMENTS:
Personal property		-	\$ 129.24								
Annual income		-	\$5,736.00								
Total			\$5,865.24								
DOD: 8/14/25			<u>Court Investigator Advised Rights on 11/17/11.</u>								
			<u>Voting Rights Affected Need Minute Order</u>								
Cont. from 010312			<u>Minute Order dated 11/30/11 states: Ruth Hill informs the Court that she is objecting to the petition, and is in the process of hiring an attorney. The Court orders that any power of attorney previously given to any party regarding health care and finances be suspended. The Court extends the temporary to 1/3/12. Ms. Kruthers is directed to prepare the order. The General Hearing remains set for 1/3/12.</u>								
Aff.Sub.Wit.			<u>Proposed Conservatee Selina Pasillas filed an Objection on 12-28-11.</u>								
✓ Verified			<u>Minute Order dated 1/3/12 states: Mr. Neilson informs the Court that he is representing Ruth Hill. Ms. Garcia informs the Court that the mortgage is six months behind. Matter continued to 2/7/12 and Temporary Letters extended.</u>								
Inventory			<u>As of 2-1-12, nothing further has been filed.</u>								
PTC			<u>*See attached pages</u>								
Not.Cred.			Reviewed by: NRN / skc								
✓ Notice of Hrg			Reviewed on: 2-1-12								
✓ Aff.Mail		W	Updates:								
Aff.Pub.			Recommendation:								
Sp.Ntc.			File 8 - Pasillas								
Pers.Serv.											
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FTB Notice											

Cont'd:

Petitioner states conservatee resides at Nazareth House, and was reportedly diagnosed with dementia in December 2010 (*Capacity Declaration* indicates the dementia diagnosis was made by the hospice physician on 3/5/11). Petitioner learned of conservatee through Hinds Hospice in June 2011, as there was concern about her failing health and her daughter RuthAnn's management of the finances and interference with her care (conservatee's husband also resided at Nazareth House prior to his death on 7/8/11). Petitioner also received a referral from APS on 8/2/11; Petitioner's subsequent investigation determined that although conservatee was healthy and safe, it was only because she was in a facility that was meeting her needs. Through its investigation, Petitioner has determined that conservatee's money had been moved or withdrawn from several bank accounts just before and after her husband's death, and that conservatee's daughter RuthAnn had access to all those accounts. Furthermore, RuthAnn attempted to have her mother sign a power of attorney while at Nazareth House; despite being advised that her mother did not have the capacity to sign such documents, RuthAnn provided Cititbank with a power of attorney executed 8/20/11. RuthAnn currently lives in the conservatee's home and claims all of the furniture belongs to her. Conservatee also has a son who lives out of state.

Petitioner seeks:

- **Appointment as conservator over conservatee's person and estate**, in order to make medical decisions and ensure conservatee's continued proper care, and to also marshal conservatee's assets and use them for her care, including an overdue bill from the Nazareth House (RuthAnn has not been paying for proposed conservatee's care);
- **Appointment as successor trustee of the Manuel and Selina Pasillas Revocable Trust**, dated 8/23/10;
- **A Court order revoking any and all powers of attorney**, whether for healthcare or for finances.the authority to sell conservatee's personal residence as well as her personal property, and finally,
- **Court authorization to retain the services of a licensed real estate broker** to assist in the sale of the residence.

Court Investigator Jennifer Young filed a report on 12/22/11.

Declaration of Janet Wright, filed 11/29/11, states she met with the Conservatee, who likes where she is currently residing and hopes to remain there (Nazareth House); Conservatee stated she will not object to the temporary guardianship with the Public Guardian as temporary conservator of both person and estate (Conservatee realizes that there are some problems with her financial affairs). If after the financial issues have been resolved, and the Court determines that a Conservatorship is required, Conservatee will request the appointment of her son and daughter as co-conservators.

Objection to Establishment of Conservatorship, filed 12/28/11 by Proposed Conservatee Selina Pasillas, states she does not need a conservator at this time because she is capable of managing her own affairs. If the Court determines conservatorship is required, the appropriate person to serve is her son, Joe Pasillas, as he is very level-headed. Mrs. Pasillas understands that there are concerns regarding the state of her financial affairs, including the source and amount of her monthly income. She is comfortable with her current placement at Nazareth House, but if it is determined that sufficient funds are available to secure her personal residence and care, she would like to return home. If the Court deems it necessary to continue the temporary conservatorship with the Public Guardian acting as Temporary Conservator to further investigate the issue, Mrs. Pasillas will agree to the continuation of the temporary conservatorship at this time. Mrs. Pasillas remains confident that the funds are available and the Public Guardian will no longer be needed.

Cont'd:

NEEDS/PROBLEMS/COMMENTS Cont'd:

- 1. Petitioner requests court authority to sell Decedent's residence and all furniture and furnishings within the residence pursuant to PrC §2540; need supporting declaration, pursuant to §2540(b).**
- 2. In addition to conservator, Petitioner requests appointment as successor trustee of the Manuel and Selina Pasillas Revocable Trust dated 8/23/10 so as to protect the trust assets; however, the Trust matter is not before this Court – need separate petition (and a new trust case file opened) for appointment of a successor trustee.**

Petition for Settlement of First and Final Account of Trustee; (2) Petition to Terminate Trust and for Order of Distribution of Trust Assets; and (3) Approval of Trustee and Attorney's Fees and Costs [Prob. C. §§ 16063, 17200, & 17200(5), CRC. Rule 7.902]

<p>Leta Jane Lewis DOD: 12-31-10</p>	<p>RONALD DEE EBNER, Trustee of the LETA JANE LEWIS TRUST, dated 10-20-89, as amended and restated on 3-31-09, is Petitioner.</p> <p>Petitioner requests Court review of the first and final account and of the acts of the trustee pursuant to Probate Code §17200.</p> <p>Account period: 12-31-10 through 9-30-11</p> <p>Accounting: \$1,124,478.48 Beginning POH: \$1,085,217.68 Ending POH: \$1,037,703.73 (\$572,610.83 cash, remainder in bonds)</p> <p>Trustee: \$9,792.00 (itemized) Attorney: \$2,247.70</p> <p>Petitioner states the real property was sold and the attorney fees, appraisal fees, and tax fees were paid during the course of trust administration.</p> <p>Reserve: \$15,500.00 (for any unpaid income taxes, accountant fees, attorney fees and costs, trustee's fees, and any other expenses incurred prior to final distribution)</p> <p>The sole trust beneficiary is the Vedanta Society of Sacramento pursuant to certain terms. Petitioner proposed to distribute the balance of the trust as follows:</p> <p>Vedanta Society of Sacramento (for general use): \$83,566.63 in cash plus \$69,763.93 in bonds (total \$153,330.56 or 15%)</p> <p>Vedanta Society of Sacramento (for use in India): Residue (85%) consisting of \$473,544.21 in cash and \$395,328.96 in bonds.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> The final distribution amounts do not appear to include payment of the trustee fees. The Court may require clarification or recalculation. Need order. 																																																			
<table border="1" style="width: 100%;"> <tr><td>Aff.Sub.Wit.</td><td></td></tr> <tr><td><input checked="" type="checkbox"/> Verified</td><td></td></tr> <tr><td>Inventory</td><td></td></tr> <tr><td>PTC</td><td></td></tr> <tr><td>Not.Cred.</td><td></td></tr> <tr><td><input checked="" type="checkbox"/> Notice of Hrg</td><td></td></tr> <tr><td><input checked="" type="checkbox"/> Aff.Mail</td><td>W</td></tr> <tr><td>Aff.Pub.</td><td></td></tr> <tr><td>Sp.Ntc.</td><td></td></tr> <tr><td>Pers.Serv.</td><td></td></tr> <tr><td>Conf. Screen</td><td></td></tr> <tr><td>Letters</td><td></td></tr> <tr><td>Duties/Supp</td><td></td></tr> <tr><td>Objections</td><td></td></tr> <tr><td>Video Receipt</td><td></td></tr> <tr><td>CI Report</td><td></td></tr> <tr><td>9202</td><td></td></tr> <tr><td>Order</td><td>X</td></tr> <tr><td>Aff. Posting</td><td></td></tr> <tr><td>Status Rpt</td><td></td></tr> <tr><td>UCCJEA</td><td></td></tr> <tr><td>Citation</td><td></td></tr> <tr><td>FTB Notice</td><td></td></tr> </table>	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	W	Aff.Pub.		Sp.Ntc.		Pers.Serv.		Conf. Screen		Letters		Duties/Supp		Objections		Video Receipt		CI Report		9202		Order	X	Aff. Posting		Status Rpt		UCCJEA		Citation		FTB Notice			<table border="1" style="width: 100%;"> <tr><td>Reviewed by: skc</td></tr> <tr><td>Reviewed on: 1-31-12</td></tr> <tr><td>Updates:</td></tr> <tr><td>Recommendation:</td></tr> <tr><td>File 9 - Lewis</td></tr> </table>	Reviewed by: skc	Reviewed on: 1-31-12	Updates:	Recommendation:	File 9 - Lewis
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CI Report																																																					
9202																																																					
Order	X																																																				
Aff. Posting																																																					
Status Rpt																																																					
UCCJEA																																																					
Citation																																																					
FTB Notice																																																					
Reviewed by: skc																																																					
Reviewed on: 1-31-12																																																					
Updates:																																																					
Recommendation:																																																					
File 9 - Lewis																																																					

**Verified Petition for Order Instructing Trustee and Approving Final Distribution
from Trust [Prob. C. 17200(b)(4), (5) & (6)]**

Age:		NEEDS/PROBLEMS/COMMENTS: <u>Continued to 2/28/2012</u> at the request of the attorney.
DOD:		
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input type="checkbox"/>	Pers.Serv.	
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: KT
		Reviewed on: 1/31/12
		Updates:
		Recommendation:
		File 10 - Speegle

DOD: 09/20/11		<p>ROBERT E. TOLER, friend, is Petitioner.</p> <p>40 days since DOD.</p> <p>No other proceedings.</p> <p>I & A - \$72,143.31 Plus \$52.30 additional funds received as a refund to decedent's Bank of America account.</p> <p>Will dated 08/31/09 devises entire estate to Robert E. Toler.</p> <p>Petitioner requests Court confirmation that decedent's interest in real property identified as Tulare County APN: 001-130-013-000 and a Smith & Wesson Revolver, Colt Challenger Hand Gun, Ideal RV Trailer, and Bank of America Account #XXXX-X6757 pass to him pursuant to decedent's Will.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Attachment 11 does not state the Petitioner's interest in the property seeking to be passed to the petitioner.</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/o		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: JF</p> <p>Reviewed on: 01/31/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11 - Fraga</p>	

Atty Barrus, John E., of Barrus & Roberts (for Jesus Torres, Executor)

Status Hearing Re: Filing of the First Account or Petition for Final Distribution

DOD: 10/25/2006	<p>JESUS TORRES, son, was appointed Executor with Full IAEA without bond and <i>Letters</i> issued on 2/20/2007.</p> <p><i>Final Inventory & Appraisal</i> filed on 4/112007 shows an estate value of \$618,100.00.</p> <p><i>Notice of Status Hearing</i> filed 5/20/2010 set a status hearing on 7/6/2010 for failure to file a first account or petition for final distribution. The status hearing had been continued several times for resolution of pending matters in the estate, with the <i>Minute Order</i> dated 1/10/2011 from the last status hearing setting a status hearing on 7/11/2011.</p> <p><i>Order Confirming Sale of Real Property</i> filed on 7/8/2011 confirmed sale of the estate real property for \$40,000.00.</p> <p><i>Minute Order</i> dated 7/11/2011 from the continued status hearing states no appearances were made. The Court indicates for the record that Mr. Barrus is the attorney of record. The Court orders that no one other than Mr. Barrus is to file any documents on behalf of Mr. Torres. The Court sets the matter for an Order to Show Cause on 8/22/2011 and orders John Barrus and Jesus Torres to be present at that hearing.</p> <p><i>Minute Order</i> dated 8/22/2011 from the Order to Show Cause states counsel requests a continuance. Counsel advises the Court that he will continue to assist Mr. Torres. Matter continued to 11/22/2011 for status hearing.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 11/22/2011.</u> <i>Minute Order</i> [Judge Hamlin] states John Barrus appears by CourtCall. Continued at the request of Mr. Barrus. Matter set on 2/7/2012 for filing of the first account.</p> <p>1. Need first account, petition for final distribution, or current status report pursuant to Local Rule 7.5(B).</p>
Cont. from 112211		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt X		
UCCJEA		
Citation		
FTB Notice		
<p>Reviewed by: LEG</p> <p>Reviewed on: 1/31/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 12 - Arteaga</p>		

Probate Status Hearing Re: Filing of the Next Account

Age: 18	<p>DIANE STEVENS was appointed Guardian of the Person and Estate of JONATHAN A. STEVENS on 3-24-08 without bond with all funds and property to be placed in blocked accounts.</p> <p>Final Inventory and Appraisal filed 7-21-08 reflected a total estate value of \$55,400.02, of which \$400.02 was cash and the remainder was the value of a mobile home and personal property located in a mini storage.</p> <p>The second account settled on 10-5-10 reflected \$1,864.05 cash and the items referenced above.</p> <p>On that date, the Court set this status hearing for the filing of the next account.</p> <p>The minor turned 18 on 2-28-11.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need final account pursuant to Probate Code §2630.</p>
DOB: 2-28-1993		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>Reviewed by: skc</p> <p>Reviewed on: 1-31-12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13 - Stevens</p>	

Age: 15	<p>TEMPORARY DENIED 12-14-11</p> <p>ALICIA NICOLE VASQUEZ, Sister, is Petitioner.</p> <p>LETICIA MAGALLANES is the current (Successor) Guardian. Guardianship was originally established 5-29-03. Ms. Magallanes was appointed Successor Guardian on 7-22-10.</p> <p>- <i>Personally served 1-18-12</i></p> <p>Father: WILLIAM JOSEPH VASQUEZ - <i>Consent and Waiver of Notice filed 12-2-11</i></p> <p>Mother: GRACIELA BELDA RAMIREZ - <i>Deceased</i></p> <p>Paternal Grandfather: William Joseph Vasquez - <i>Consent and Waiver of Notice filed 12-2-11</i></p> <p>Paternal Grandmother: Barbara Vasquez - <i>Consent and Waiver of Notice filed 12-2-11</i></p> <p>Maternal Grandfather: Bernardo Ramirez - <i>Deceased</i></p> <p>Maternal Grandmother: Elvira Gonzalez Ramirez - <i>Consent and Waiver of Notice filed 12-2-11</i></p> <p>Siblings: Rosalee Marie Holguin, Anthony James - <i>Consent and Waiver of Notice filed 12-2-11</i></p> <p><i>Minor consents and waives notice.</i></p> <p>Petitioner states the current guardian is not properly caring for the minor physically, emotionally and financially, as stated by the minor. Petitioner states there are various incidents that support this statement. Petitioner is the minor’s sister and she believes it is in the minor’s best interest to reside with her.</p> <p>Court Investigator Samantha Henson filed a report on 1-31-12. The report also attaches a Supplemental Report from Sacramento County Court Investigator James A. Brozek.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> There is currently no vacancy. Page 14B is a Petition for Termination of the current Guardianship filed by this Petitioner on 12-2-11.</p> <p><u>Note:</u> The Petition for Termination of the current guardianship alleges that the current guardian is not properly caring for the minor. Examiner notes that all relatives consent to appointment of this Petitioner; <u>however, Notice of Hearing has not been served on the current guardian.</u></p> <p><u>Note:</u> The minor and the current Guardian currently reside in Sacramento.</p> <p><u>Note:</u> Petitioner states there are various incidents to support her statements, but there is no further information provided.</p> <p>1. Petitioner filed a civil proof of personal service of the guardianship petition on the current Guardian; however, it does not indicate service of the mandatory “Notice of Hearing” form, so there is no indication that the Guardian is aware of this hearing date or of the petition for termination (Page 14B).</p> <p>2. Need proof of service of Notice of Hearing with a copy of the Petition on the Guardian Leticia Magallanes at least 15 days prior to the hearing.</p>	
DOB: 4-17-96			
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			
✓ Clearances			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: skc			
Reviewed on: 1-31-12			
Updates:			
Recommendation:			
File 14A – Vasquez			

Petition for Termination of Guardianship

Age: 15	ALICIA NICOLE VASQUEZ , Sister, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> The minor and the current Guardian currently reside in Sacramento.</p> <p><u>Note:</u> Petitioner states there are various incidents to support her statements, but there is no further information provided.</p> <p>3. Petitioner filed a civil proof of personal service of the guardianship petition (Page 14A) on the current Guardian; however, it does not indicate service of the mandatory "Notice of Hearing" form, so there is no indication that the Guardian is aware of this hearing date, or of this petition for termination (Page 14B).</p> <p>4. Need proof of service of Notice of Hearing with a copy of the Petition for Termination on Guardian Leticia Magallanes at least 15 days prior to the hearing.</p>
DOB: 4-17-96	LETICIA MAGALLANES is the current (Successor) Guardian. Guardianship was originally established 5-29-03. Ms. Magallanes was appointed Successor Guardian on 7-22-10.	
Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Father: WILLIAM JOSEPH VASQUEZ - <i>Consents and Waives Notice</i>	
Inventory		
PTC	Mother: GRACIELA BELDA RAMIREZ - <i>Deceased</i>	
Not.Cred.		
Notice of Hrg	Paternal Grandfather: William Joseph Vasquez - <i>Consents and Waives Notice</i>	
Aff.Mail		
Aff.Pub.	Paternal Grandmother: Barbara Vasquez - <i>Consents and Waives Notice</i>	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Maternal Grandfather: Bernardo Ramirez - <i>Deceased</i>	
Letters		
Duties/Supp	Maternal Grandmother: Elvira Gonzalez Ramirez - <i>Consents and Waives Notice</i>	
Objections		
Video Receipt	Siblings: Rosalee Marie Holguin, Anthony James - <i>Consents and Waives Notice</i>	
<input checked="" type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> Clearances	<i>Minor consents and waives notice.</i>	
<input checked="" type="checkbox"/> Order		
Aff. Posting	Petitioner states the current guardian is not properly caring for the minor physically, emotionally and financially, as stated by the minor. Petitioner states there are various incidents that support this statement. Petitioner is the minor's sister and she believes it is in the minor's best interest to reside with her.	
Status Rpt		
UCCJEA		
Citation		
FTB Notice	Court Investigator Samantha Henson filed a report on 1-31-12. The report also attaches a Supplemental Report from Sacramento County Court Investigator James A. Brozek.	
		Reviewed by: skc
		Reviewed on: 1-31-12
		Updates: 2-1-12
		Recommendation:
		File 14B - Vasquez

Atty Guerrero, Victoria (pro per – maternal aunt/competing Petitioner)

Atty Almeras, Irene (pro per – paternal grandmother/Petitioner)

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

Naveah, 3 DOB: 08/30/08	<u>TEMPORARY EXPIRES 02/07/12</u>	NEEDS/PROBLEMS/COMMENTS:
Jahnessa, 2 DOB: 02/06/10	IRENE ALMERAS, paternal grandmother, is Petitioner.	<p><u>SEE PAGE 15B FOR COMPETING PETITION.</u></p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Declaration of Due Diligence filed 12/13/11 states that the mother's whereabouts are unknown. If diligence is not found, need proof of personal service at least 15 days before the hearing of <i>Notice of Hearing</i> along with a copy of the <i>Petition for Guardianship or Consent and Waiver of Notice</i> for: <ul style="list-style-type: none"> - Maria Guerrero (mother) 3. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> along with a copy of the <i>Petition for Guardianship or Consent and Waiver of Notice or Declaration of Due Diligence</i> for: <ul style="list-style-type: none"> - Jesus Guerrero (maternal grandfather)
Cont. from	Father: FELICIANO JIMENEZ – <i>currently incarcerated; consent and waiver of notice filed 12/27/11</i>	
<input type="checkbox"/> Aff.Sub.Wit.	Mother: MARIA GUERRERO – <i>declaration of due diligence filed 12/13/11</i>	
<input checked="" type="checkbox"/> Verified	Paternal grandfather: APOLINAR JIMENEZ – <i>consent and waiver of notice filed 12/27/11</i>	
<input type="checkbox"/> Inventory	Maternal grandfather: JESUS GUERRERO Maternal grandmother: MONICA SIFUENTES – <i>served by mail on 12/20/11</i>	
<input type="checkbox"/> PTC	Petitioner states that the father is currently incarcerated and mother has a drug problem and does not have a stable home. Mother was kicked out of her last home after a drug bust. Petitioner states that the mother drops the children off wherever she can find a place. Petitioner believes that the mother is unfit to care for the children as she needs extensive counseling and drug rehab.	
<input type="checkbox"/> Not.Cred.	Court Investigator JoAnn Morris' report was filed 01/30/12.	
<input type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input 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 checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 02/01/12
		Updates:
		Recommendation:
		File 15A - Jimenez

Atty Guerrero, Victoria (pro per – maternal aunt/Petitioner)

Atty Almeras, Irene (pro per – paternal grandmother/competing Petitioner)

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

Naveah, 3 DOB: 08/30/08		<p align="center"><u>NO TEMPORARY REQUESTED</u></p> <p>VICTORIA GUERRERO, maternal aunt, is Petitioner.</p> <p>Father: FELICIANO JIMENEZ – <i>currently incarcerated</i></p> <p>Mother: MARIA GUERRERO</p> <p>Paternal grandfather: APOLINAR JIMENEZ</p> <p>Paternal grandmother: IRENE ALMERAS</p> <p>Maternal grandfather: JESUS GUERRERO</p> <p>Maternal grandmother: MONICA SIFUENTES</p> <p>Petitioner states that the father is currently incarcerated and mother is unfit to care for the children. Mother has no stable home and is currently bouncing from house to house. Petitioner also states that she believes the mother is doing drugs.</p> <p>Court Investigator JoAnn Morris’ report was filed 01/30/12.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>SEE PAGE 15A FOR COMPETING PETITION.</u></p> <p>4. <i>Need Notice of Hearing.</i></p> <p>5. Need proof of personal service at least 15 days before the hearing of <i>Notice of Hearing</i> along with a copy of the <i>Petition for Guardianship or Consent and Waiver of Notice or Declaration of Due Diligence</i> for:</p> <ul style="list-style-type: none"> - Maria Guerrero (mother) - Feliciano Jimenez (father) <p>6. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> along with a copy of the <i>Petition for Guardianship or Consent and Waiver of Notice or Declaration of Due Diligence</i> for:</p> <ul style="list-style-type: none"> - Jesus Guerrero (maternal grandfather) - Monica Sifuentes (maternal grandmother) - Apolinar Jimenez (paternal grandfather) - Irene Almeras (paternal grandmother)
Jahnessa, 2 DOB: 02/06/10			
Cont. from			
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			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
		Reviewed by: JF	
		Reviewed on: 02/01/12	
		Updates:	
		Recommendation:	
		File 15B - Jimenez	

Various Petitions

Age:		NEEDS/PROBLEMS/COMMENTS: <u>Examiner Review not be provided for the Maxwell Family Trust cases.</u>
DOD:		
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
	Reviewed by:	
	Reviewed on:	
	Updates:	
	Recommendation:	
	File 16A - Maxwell	

16A-F

Age: 88 years DOB: 9/26/22	<p>MARGUERITE S. HUGHES was appointed as conservator of the person and estate on 5/17/10 with bond set at \$412,500.00</p> <p>Bond of \$412.500 was filed on 8/12/10 and Letters issued on 9/15/10.</p> <p>Inventory and appraisal was due 12/15/10.</p> <p>First account is now due.</p> <p>A status hearing was set for the filing of the inventory and appraisal and for the filing of the first account.</p> <p>Minute Order dated 9/6/11 states Dennis Watson appeared by Court Call and stated a personal emergency had occurred. He is close to filing an accounting, pending a life insurance letter. The status hearing was continued to 10/11/11.</p> <p>At the Status Hearing on 10/11/11 there were no appearances and this Order to Show Cause Hearing was set.</p> <p>A copy of the Minute Order was mailed to Mr. Watson on 10/14/11.</p>	NEEDS/PROBLEMS/COMMENTS: Continued from 12/13/11.
Cont. from 121311		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 1/31/12
		Updates:
		Recommendation:
		File 17 - Peters

First and Final Report of Executor; and Petition for Final Distribution without an Accounting (Probate Code 11640, 10954)

DOD: 8-13-10	LONNIE F. PETTY , Spouse, was appointed Executor with Full IAEA without bond and Letters issued on 5-12-11.	NEEDS/PROBLEMS/COMMENTS:
	Accounting is waived.	
<input type="checkbox"/> Aff.Sub.Wit.	I&A: \$1,296,260.00	
<input checked="" type="checkbox"/> Verified	POH: \$1,298,827.91 consisting of \$2,567.91 cash plus Decedent's 50% community property interest in the following:	
<input checked="" type="checkbox"/> Inventory	<ul style="list-style-type: none"> • a 73% interest in a business known as Strategic Mechanical Inc.; 	
<input checked="" type="checkbox"/> PTC	<ul style="list-style-type: none"> • a 20% interest in a limited liability company known as Mechanical Properties, LLC; and 	
<input checked="" type="checkbox"/> Not.Cred.	<ul style="list-style-type: none"> • various personal property, furnishings and personal effects) 	
<input checked="" type="checkbox"/> Notice of Hrg	Executor: Waived	
<input checked="" type="checkbox"/> Aff.Mail	Attorney: Waived	
	Distribution pursuant to Decedent's Will:	
<input type="checkbox"/> Aff.Pub.	Lonnie F. Petty: Personal property	
<input type="checkbox"/> Sp.Ntc.	Lonnie F. Petty, Trustee of the Jane E. Petty Bypass Trust (testamentary trust): Business interests	
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters	5-12-11	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input checked="" type="checkbox"/> FTB Notice		
		Reviewed by: skc
		Reviewed on: 2-1-12
		Updates:
		Recommendation: SUBMITTED
		File 18 - Petty

Atty Amador, Catherine A. (for Sharon Shields and Joyce F. Biglione – Petitioners)

Atty Rindlisbacher, Curtis (Court-appointed for Conservatee Robert J. Johansen)
 Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

Age: 89	TEMPORARY EXPIRES 2-7-12	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>This matter will be heard at 11:00 a.m.</u></p> <p><u>Court Investigator advised rights on 1-23-12.</u></p> <p><u>Voting rights affected – need minute order</u></p> <p>Note: Page 20 is a related petition for Faye M. Johansen (Robert J. Johansen’s wife).</p> <p>Note: Sharon is Robert’s daughter and Joyce and Linda are Faye’s daughters.</p> <p>Note: Temporary conservatorship of the person only was granted ex parte on 12-27-11 and extended at the hearing on 1-5-12. The orders restricted Mr. Johansen from driving, but did not authorize moving the couple from their home during the temporary conservatorship.</p> <p>At the hearing on 1-5-12, the Court informed Mr. Johansen that there will be help several times a week.</p> <p><u>The following issues exist:</u></p> <p>SEE PAGE 2</p> <p>Reviewed by: skc</p> <p>Reviewed on: 2-1-12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 19 - Johansen</p>
DOB: 11-5-22	SHARON SHIELDS, Daughter, and JOYCE F. BIGLIONE, Step-Daughter, are Petitioners and request SHARON SHIELDS be appointed Conservator of the Person with medical consent powers and dementia medication and placement powers.	
	Petitioners also request appointment of LINDA K. BABCOCK, Step-Daughter, as Conservator of the Estate with bond set at \$75,000.00.	
Aff.Sub.Wit.	Voting Rights Affected	
✓ Verified	A Capacity Declaration was filed on 12-23-11.	
Inventory	Estimated Value of Estate:	
PTC	Personal Property: \$10,000.00	
Not.Cred.	Annual income: \$36,000.00	
Notice of Hrg	Total: \$46,000.00	
Aff.Mail	Petitioners state Mr. Johansen has been diagnosed with dementia and is unable to manage his daily needs. Petitioners are also seeking conservatorship for his wife (Page 20).	
Aff.Pub.	Petitioners state Mrs. Johansen was hospitalized in September 2011 and when she was discharged the couple moved into an assisted living facility (the Windham), but had difficulty adjusting. Mrs. Johansen became aggressive and hostile, and Mr. Johansen’s health was deteriorating, but he continued to drive. The couple moved back into their home against the advice of family, refused most assistance, and Mr. Johansen continued to drive, despite repeated requests to stop. Mr. Johansen has trouble navigating back home and obtaining assistance when lost.	
Sp.Ntc.	Mr. and Mrs. Johansen previously informally delegated responsibility for payment of their bills to Mrs. Johansen’s daughter Linda K. Babcock, who has power of attorney for Mrs. Johansen. Mr. Johansen’s assets consist of savings and pension income, but he is unable to balance the account without assistance. Petitioners request that Linda be appointed Conservator of Mr. Johansen’s estate.	
Pers.Serv.	Court Investigator Jennifer L. Daniel filed a report on 1-31-12.	
✓ Conf. Screen		
✓ Letters		
✓ Duties/Supp		
Objections		
✓ Video Receipt		
✓ CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation	X	
FTB Notice		

NEEDS/PROBLEMS/COMMENTS (Continued):

1. Need “Duties of Conservator” form signed by Sharon Shields.
2. Need Notice of Hearing for this hearing date. (*Notice of Hearing was filed for the 1-5-12 temporary hearing only.*)
3. Need proof of service of Notice of Hearing with a copy of the Petition at least 15 days prior to the hearing per Probate Code §1822 on:
 - Sandy Caudle (daughter)
 - Susanna Caudle (granddaughter)
 - Sarah Norris (granddaughter)
 - Jennifer Jones (granddaughter)
 - Corinne Chitwood (granddaughter)
 - Nina Bennie (sister) (If notice is not excused – Petitioners request notice to Nina Bennie be excused because she has not been in touch with the family for many years.)
4. Need Citation.
5. Need proof of personal service of Citation with a copy of the Petition at least 15 days prior to the hearing per Probate Code §1824 on Proposed Conservatee Robert J. Johansen.
Examiner notes that a civil “Proof of Service” filed 1-3-12 reflects service of Notice of Hearing and Petition; however, the Citation was not included. Further, the Notice of Hearing is a mandatory Judicial Council form for filing in connection with probate conservatorship matters.
6. Petitioners request bond for the Conservator of the Estate be set at \$75,000.00; however, the Court Investigator’s report indicates a higher value of assets than originally listed in the Petition. Need verified declaration regarding assets with estimated values in order to apply the correct bond amount.

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

Age: 92	TEMPORARY EXPIRES 2-7-12	NEEDS/PROBLEMS/COMMENTS:	
DOB: 6-29-19	<p>SHARON SHIELDS, Daughter, and JOYCE F. BIGLIONE, Step-Daughter, are Petitioners and request appointment of JOYCE F. BIGLIONE be appointed Conservator of the Person with medical consent powers and dementia medication and placement powers.</p> <p>Voting Rights NOT Affected</p> <p>A Capacity Declaration was filed on 12-23-11.</p> <p>Petitioners state Mrs. Johansen has been diagnosed with dementia and is unable to manage her daily needs. Petitioners are also seeking conservatorship for her husband (<i>Page 19</i>).</p> <p>Petitioners state Mrs. Johansen was hospitalized in September 2011 and when she was discharged the couple moved into an assisted living facility (the Windham), but had difficulty adjusting. Mrs. Johansen became aggressive and hostile, and Mr. Johansen's health was deteriorating, but he continued to drive. The couple moved back into their home against the advice of family and refused most assistance.</p> <p>Petitioners state their sister LINDA BABCOCK has had power of attorney for Mrs. Johansen for several years. (The related Petition for Mr. Johansen requests that Linda be appointed Conservator of his estate.)</p> <p>Court Investigator Jo Ann Morris filed a report on 1-27-12.</p>	<p><u>This matter will be heard at 11:00 a.m.</u></p> <p><u>Court Investigator advised rights on 1-24-12.</u></p> <p><u>Note:</u> Page 19 is a related petition for Robert J. Johansen (Faye M. Johansen's husband).</p> <p><u>Note:</u> Sharon is Robert's daughter and Joyce and Linda are Faye's daughters.</p> <p><u>Note:</u> Temporary conservatorship of the person only was granted ex parte on 12-27-11 and extended at the hearing on 1-5-12. The orders restricted Mr. Johansen from driving, but did not authorize moving the couple from their home during the temporary conservatorship.</p> <p>At the hearing on 1-5-12, the Court informed Mrs. Johansen that there will be help several times a week.</p> <p><u>The following issues exist:</u></p> <p style="text-align: center;"><u>SEE PAGE 2</u></p> <p>Reviewed by:</p> <p>Reviewed on:</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 20 - Johansen</p>	
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			X
Objections			
✓ Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation	X		
FTB Notice			

Atty Amador, Catherine A. (for Joyce F. Biglione and Sharon Shields – Petitioners)
Atty Helon, Marvin T. (Court-appointed for Conservatee Faye M. Johansen)

NEEDS/PROBLEMS/COMMENTS (Continued):

7. Need Notice of Hearing for this hearing date. (*Notice of Hearing was filed for the 1-5-12 temporary hearing only.*)
8. Need proof of service of Notice of Hearing with a copy of the Petition at least 15 days prior to the hearing per Probate Code §1822 on:
 - Linda K. Babcock (daughter)
 - Marge Tinkler (sister)
 - Mozelle Cate (sister)
 - Betty Mason (sister) (If notice is not excused – Petitioners request notice to Betty Mason be excused.)
 - Terri R. Sharpton (granddaughter)
 - Randall S. Biglione (grandson)
 - Christian Babcock (grandson)
 - Brandi Babcock (granddaughter)

9. Need Citation.

10. Need proof of personal service of Citation with a copy of the Petition at least 15 days prior to the hearing per Probate Code §1824 on Proposed Conservatee Faye M. Johansen.

Examiner notes that a civil "Proof of Service" filed 1-3-12 reflects service of Notice of Hearing and Petition; however, the Citation was not included. Further, the Notice of Hearing is a mandatory Judicial Council form for filing in connection with probate conservatorship matters.