

Probate Status Hearing Re: (1) Failure to File Inventory & Appraisal; (2) Failure to File a First Account or Petition for Final Distribution [Prob. C. 12200, et seq.]

Age:		NEEDS/PROBLEMS/COMMENTS:  <p style="text-align: center;"><b><u>OFF CALENDAR</u></b>  <b>Accounting and Petition for Final Distribution filed 02/04/13 and set for hearing on 03/12/13</b></p>
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: JF
		Reviewed on: 02/11/13
		Updates:
		Recommendation:
		File 1 - Walker

<b>DOD: 09/03/09</b>	<p><b>TERESA GOODING</b>, daughter, was appointed Administrator with Limited IAEA Authority and funds held in a blocked account on 02/02/11.</p> <p><b>Letters of Administration</b> were issued on 02/03/11.</p> <p><b>Receipt and Acknowledgement of Order for the Deposit of Money into Blocked Account</b> filed 03/01/11 states funds in the amount of \$73,995.14 were deposited with Umpqua Bank on 02/25/11.</p> <p><b>Corrected Final Inventory &amp; Appraisal filed 12/07/12</b> - \$92,328.14</p> <p><b>Status Report filed 1-25-13</b> states an order was made on 12-4-12 passing certain property to the estate and other parties. There have been discussions regarding the other parties buying out the interest of the estate, but no agreement has been reached. It is estimated that administration will need to continue for 4-6 months to get the property sold.</p> <p><b>Minute Order from Status Hearing Re Filing of First Accounting of Petition for Final Distribution dated 01/28/13</b> set this matter for status and states: Mr. Rindlisbacher is to give notice to the other parties.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>As of 02/11/13, nothing further has been filed in this matter.</b></p>	
<b>Cont. from</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
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<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
			<b>Reviewed by:</b> JF
			<b>Reviewed on:</b> 02/11/13
			<b>Updates:</b>
	<b>Recommendation:</b>		
	<b>File 2 - Sanchez</b>		

**Petition to Compel Turnover of the Betty Ruth Cozby Trust Pursuant to Probate Code Section 16061.5 and for Damages and Attorney's Fees Pursuant to Probate Code Section 16061.9**

		<b>JANICE POTTER</b> is Petitioner.	<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <p><b>Continued from 1/4/13. As of 2/11/13 the following issue remains:</b></p> <p>1. Need Order.</p>
		<b>Petitioner states</b> she is an heir at law, and believes she is a beneficiary of the Betty Ruth Cozby Trust.	
		Betty Ruth Cozby died in April 2011.	
		Betty Cozby was unmarried and did not have children, and her parents and siblings predeceased her. Petitioner is a niece of Betty Cozby and heir at law under applicable Probate Code intestacy statutes.	
Cont. from 022912, 040412, 060412, 081312, 100412, 111512, 010413		Petitioner believes Betty Cozby's friend, Edward D. Reimer, is the named successor Trustee of the Betty Ruth Cozby Trust.	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		Upon the death of Ruth Cozby the Trust became irrevocable. Petitioner states she requested orally, and then more formally, through counsel, a copy of the Trust. The formal request was made on 8/17/2011. No response has been received to the request.	
		Probate Code §16061.5 provides that a trustee has a duty to provide a true and complete copy of the terms of an irrevocable trust, or irrevocable portion of a trust, to any beneficiary who requests it, and to any heir of a deceased settlor who requests it.	
		<b>Wherefore, Petitioner seeks relief as follows:</b>	
		<ol style="list-style-type: none"> <li>1. For an Order compelling Edward D. Reimer to provide full and complete copies of the Betty Ruth Cozby trust, including any applicable schedules and amendments, if any;</li> <li>2. For an Order compelling turnover of relevant information on the administration of assets of the Trust pursuant to Probate Code section 16061;</li> <li>3. That Edward D. Reimer be ordered to personally pay Petitioner's attorney's fees and costs in filing and prosecuting this petition.</li> </ol>	
		<b>Statement of Assets Held in The Betty Cozby Living Trust filed by Edward D. Reimer and Ola May Langley on 6/4/12.</b>	
		<b>Reviewed by: KT</b>	
		<b>Reviewed on: 2/11/13</b>	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 3A - Cozby</b>	

**Status Re: Accounting**

		<p><b>JANICE POTTER</b> filed a Petition to Compel Turnover of the Betty Ruth Cozby Trust and for Damages and Attorney's Fees. The matter was heard on 4/4/12 and continued to 6/4/12.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 1/4/2013. Minute Order states Mr. Campbell appearing by Court Call. Mr. Gilmore advises the Court that Mr. Reimer has hired an accountant to prepare the accounting. He further advises that the inventory and appraisal of the jewelry has been completed.</b></p> <p>1. Need Accounting or current written status report pursuant to Local Rule 7.5.</p>
<p>Cont. from 081312, 100412, 111512, 010413</p>			
<input type="checkbox"/>	Aff.Sub.Wit.	<p>At the hearing on 6/4/12 the court set a status hearing for the filing of the accounting.</p>	
<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		
			<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 2/11/13</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 3B – Cozby</b></p>

<b>DOD: 08/01/12</b>		<p><b>LARRY LUNA</b>, surviving spouse, was appointed Administrator with Limited IAEA Authority and funds to be deposited into a blocked account on 01/30/13.</p> <p>Letters of Administration were issued on 01/30/13.</p> <p>Minute Order from 01/28/13 set this matter for Status Re Filing of Receipts.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need Receipt and Acknowledgement of Order For the Deposit of Money Into Blocked Account (Form MC-356).</p> <p><b>Note:</b> It does not appear that an Order to Deposit Money into Blocked Account (form MC-355) has been submitted by Petition or signed by the Court</p>
<b>Cont. from</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Receipt</b>	x		
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
		<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 02/11/13</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 4 - Luna</b></p>	

**Petition to Determine Succession to Real Property (Prob. C. 13151)**

<b>DOD: 2/25/2012</b>		<p><b>DARLA JEAN COWAN</b>, granddaughter, and <b>MAKENZIE MARIE COWAN</b>, great-granddaughter, are petitioners.</p> <p>40 days since DOD.</p> <p>No other proceedings.</p> <p>Will dated: 6/20/1998 – devises 51% of the estate to Darla Jean Cowan and 49% of the estate to Makenzie Marie Cowan.</p> <p>I &amp; A                      -                      <b>\$45,000.00</b></p> <p><b>Petitioners request</b> court determination that Decedent's 100% interest in real property located at 4321 E. McKenzie Avenue in Fresno pass to them prusuatn to decedent's Will, 51% to Darla Jean Cowan and 49% to Makenzie Marie Cowan.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Proof of service of the Notice of Hearing on:</p> <p>    a. Scott Aaron Cowan (named executor)</p> <p>    b. Donnie Adams (grandson)</p> <p>Indicates it was served on 2/6/13, 9 days-notice and not the required 15-day notice.</p>	
<b>Cont. from 013113</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			
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<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input type="checkbox"/>	<b>Letters</b>			
<input type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			
		<b>Reviewed by: KT</b>		
		<b>Reviewed on: 1/29/13</b>		
		<b>Updates:</b>		
		<b>Recommendation:</b>		
		<b>File 5 - Knight</b>		



Status Hearing Re: Property and all Outstanding Matters

<b>DOD: 7/2/2010</b>		<p><b>DAVID D. GRABER</b>, Son and Executor with Full IAEA with bond of \$564,000.00, petitioned the court to purchase the estate's real property for \$275,000.00.</p> <p>On 6/28/12 the court confirmed the sale and set this status hearing regarding the property.</p> <p><b>Status Report of Attorney Richard Hemb filed on 2/13/13</b> states the remaining administrative activities involve the disposition of the real property. The Decedent's real property in Madera was appraised at the date of death at \$80,000.00. The asking price was reduced to \$60,000.00. No activity presented itself at that level. As reported at the last status conference, the real estate broker noticed activity for similar property at a selling price of \$25,000.00. Since the last status conference the personal representative lowered the asking price to \$25,000.</p> <p>By Order Confirming Sale of Real Property issued on 6/28/2012, the court approved the sale of the Decedent's Fresno property to the Personal Representative. Closing of the sale has been accomplished.</p> <p>The only remaining asset in the estate is the Madera property. Because the personal representative has not received any offers even at the significantly reduced selling price, the personal representative plans to ask this court to allow the estate to be closed with an order to distribute the title to the real property equally to the beneficiaries.</p> <p>A final accounting is in progress and should be filed with the court very soon.</p>	<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <p><b>Continued from 10/19/12. Minute order states Counsel advises the Court that his client has been approved for a loan.</b></p>
<b>Cont. from 083112, 101912</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>		
<input type="checkbox"/>	<b>Aff.Mail</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 2/11/13</b></p> <p><b>Updates: 2/13/13</b></p> <p><b>Recommendation:</b></p> <p><b>File 7 - Graber</b></p>	

**Status Hearing Re: Settlement Agreement**

Ernest DOD: 2003	<p><b>DENNIS L. THOMAS</b>, son, beneficiary, and Successor Co-Trustee, filed a Petition to Determine Validity of Trust Instruments; to Determine Title to Property; to Recover Trust Property; to Compel Trustee to Account and Report; Financial Elder Abuse on 12-19-11 that was set for hearing on 2-7-12.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>	
Loretta DOD: 6/9/11			<p><b>Minute Order 12-14-12:</b> Mr. Keeler is appearing via conference call. Mr. Ivy informs the Court that the first half of the settlement agreement has been completed and the drafts have been circulated. Matter continued to 2/15/13. Parties agree that the documents may be submitted to the Court ex parte. Continued to 2-15-13.</p>
Cont. from 121412	<p><b>JANETTE COURTNEY</b>, Executor of the Estate of Loretta Drummond and Trustee of the Loretta M. Drummond "S" Trust filed a Response and Request for Abatement per Probate Code §854 on 1-30-12.</p>	<p><u>As of 2-12-13, nothing further has been filed.</u></p>	
Aff.Sub.Wit.		<p><b>Settlement Conference Minute Order 10-17-12 states:</b> The Court notes for the record that a conference call was conducted in chambers with Charles Ashdon and Janette while both counsel were present. Parties reach a settlement agreement as fully set forth on the record by Mr. Keeler. Mr. Keeler indicates for the record that this is intended to be a settlement of both cases. Settlement agreement to be reduced to writing within the next four to five days. The Court will retain jurisdiction to enforce the agreement. Matter set for Status Hearing regarding the settlement agreement on 12/14/12. If the agreement is completed by 12/14/12, no appearance will be necessary. Set for 12/14/12 for: Status Hearing Re: Settlement Agreement</p>	<p>1. Need settlement agreement per minute order 10-17-12.</p>
Verified	Reviewed by: skc		
Inventory	Reviewed on: 2-12-13		
PTC	Updates:		
Not.Cred.	Recommendation:		
Notice of Hrg	File 8 - Drummond		
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			

Probate Status Hearing Re: Filing of the First and Final Account

	<b>MYRNA M. BOWMAN</b> was appointed as conservator of the person and estate without bond on 9/28/11.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need first and final account or current written status report pursuant to Local Rule 7.5.
	Letters issued on 10/7/11.	
	Inventory and appraisal filed on 11/9/12 shows the estate valued at \$253,939.39	
	Notice of Status Hearing was mailed to attorney Gary L. Winter on 11/16/12.	
	<b>Status Report filed 1/10/13 states</b> the conservatee died on 7/3/12. Petitioner states she intends to file her First Account and Second and Final Account by January 31, 2013.	
Cont. from 011113		
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: 2/11/13
		Updates:
		Recommendation:
		File 9B - Robbins



**Status Hearing Re: Filing of the Inventory and Appraisal**

<b>DOD: 5/29/2009</b>	<p><b>DALE GEORG E MELL</b> was appointed as Executor on 11/9/12 with full IAEA authority and bond set at \$85,000.00</p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>	Bond of \$85,000.00 was filed on 1/4/13.	
<b>Aff.Sub.Wit.</b>	Letters issued on 1/14/13.	
<b>Verified</b>		
<b>Inventory</b>	Minute order dated 11/9/12 set this status hearing for the filing of the inventory and appraisal.	
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: KT</b>
		<b>Reviewed on: 2/11/13</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 11 - Mell</b>

Status Hearing Re: Filing of the Inventory and Appraisal

<b>DOD: 3/17/2012</b>		<p><b>JOSHUA HOUSSIERE</b> and <b>CARA HOUSSIERE</b> were appointed co-Executors with full IAEA and without bond on 9/11/2012.</p> <p>Letters issued on 9/11/12.</p> <p>Inventory and Appraisal was due on 1/11/13.</p> <p><b>Status Report filed on 2/7/2013</b> states the Executors are not aware of any assets owned by the decedent in California. The Executor are aware of assets in Louisiana consisting of mineral rights. The state of Louisiana does not have any summary proceedings for distributing such mineral rights. Therefore, the Executors initiated probate this probate proceeding, so that an ancillary proceeding could be initiated in Louisiana for purposes of transferring the mineral rights owned.</p> <p>Executors are unable to proceed with the California probate until such time as the Louisiana probate is completed. The Executors do not yet have a time frame for the completion of the Louisiana probate.</p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>		
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<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input checked="" type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		<b>Reviewed by: KT</b>	
		<b>Reviewed on: 2/11/13</b>	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 12 - Houssiere</b>	

Status Hearing Re: Filing of the Inventory and Appraisal

Age:		<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>OFF CALENDAR.</b> Inventory and appraisal filed on 10/15/12.
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		
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UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 2/11/13
		Updates:
		Recommendation:
		File 13 - Dockstader

Atty Pape, Jeffrey B., of Pape & Shewan (for Executor Kelli Pereira)

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 5/21/2012		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><b>OFF CALENDAR</b></p> <p><i>Final Inventory and Appraisal was filed 10/12/2012.</i></p>
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input checked="" 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: LEG
		Reviewed on: 2/11/13
		Updates:
		Recommendation:
		File 14 - Fischer

Atty Moore, Susan L., of Pascuzzi, Moore & Stoker (for Co-Executors David Spencer and Suzanne Spencer MacInnis)

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 7/23/2012		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><b>OFF CALENDAR</b></p> <p><i>Final Inventory and Appraisal was filed 10/15/2012.</i></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: 2/11/13
		Updates:
		Recommendation:
		File 15 – Spencer

Atty Coleman, William H., of Coleman & Horowitz (for Executor Theresa Johnson)

**Status Hearing Re: Filing of the Inventory and Appraisal**

<b>DOD: 6/6/2012</b>		<p><b>THERESA JOHNSON</b>, sister-in-law, was appointed Executor with Full IAEA without bond on 9/13/2012.</p> <p><b>Letters issued on 9/13/2012.</b></p> <p>Pursuant to Probate Code § 8800(b), <i>Final Inventory and Appraisal</i> was due 1/13/2013.</p> <p><b>Minute Order dated 9/12/2012</b> from the hearing on the petition for probate set the matter for a status hearing for filing of the inventory and appraisal on 2/15/2013.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need <i>Final Inventory and Appraisal</i> pursuant to Probate Code § 8800(b), or verified status report and proof of service of notice of the status hearing pursuant to Local Rule 7.5(B).</p>
<b>Cont. from</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>	X		
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202 Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
		<b>Reviewed by:</b> LEG	
		<b>Reviewed on:</b> 2/11/13	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 16 - Johnson</b>	

Atty Esraelian, Robyn L., of Richardson, Jones & Esraelian (for Executor Maria G. Resendes)

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 4/10/2012		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p style="text-align: center;"><b>OFF CALENDAR</b></p> <p style="text-align: center;"><i>Final Inventory and Appraisal filed 12/26/2012.</i></p>
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input checked="" 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: LEG
		Reviewed on: 2/11/13
		Updates:
		Recommendation:
		File 17 - Fields

Atty Amador, Catherine A., of Pascuzzi, Moore & Stoker (for Co-Conservators Manuel Chavez and Susan Chavez-Leon)

Status Hearing Re: Filing of the Inventory and Appraisal

Age: 39 years	<p><b>MANUEL CHAVEZ</b>, father, and <b>SUSAN CHAVEZ-LEON</b>, sister, were appointed Co-Conservators of the Person and Estate on 10/26/2012 with bond set at <b>\$201,850.00</b>.</p> <p><b>Letters issued on 12/19/2012</b>; delay in issuance of letters appears to be due to Co-Conservators obtaining bond, which was filed on 12/3/2012 (for partial \$183,500.00), and 12/19/2012 (for total \$201,850.00.)</p> <p>Pursuant to <b>Probate Code § 2610(a)</b>, <i>Final Inventory and Appraisal</i> was due on <b>1/26/2013</b>.</p> <p><b>Minute Order dated 10/18/2012</b> from the hearing on the petition for appointment set the matter for status hearing on 2/15/2013 for filing of the inventory and appraisal.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need <i>Final Inventory and Appraisal</i> pursuant to Probate Code § 2610.</p>	
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			X
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: 2/11/13	
		Updates:	
		Recommendation:	
		File 18 - Chavez	

Petition for Visitation

Age: 8	<p><b>JEANINE BAKER</b>, Mother, is Petitioner.</p> <p><b>DOUGLAS and ELIDA BAKER</b>, Maternal Grandparents, were appointed Guardians on 7-14-05.</p> <p>Father: <b>STEWART HAMBY</b>          Paternal Grandfather: Stewart Hamby, Sr.          Paternal Grandmother: Cindy Bruer</p> <p><b>Petitioner states</b> she would like to ask the courts for more visitations with Trenton like weekends and holidays. Petitioner is also concerned about her parents picking the visitation days still and that he's not attending counseling.</p> <p><b>Minute Order 9-25-12 (Current visitation):</b> The Court waives notice to father for purposes of this hearing. The Court is advised that the child is no longer seeing Ms. Heppner. Visitation between mother and the child is ordered as follows: visitation shall be every Friday after school until Saturday at 7:00 p.m., and no later. Guardians are order to deliver the child to mother's residence after school or after any activity the child is participating in on that day. Child to be pick-up by the guardians after visitation. Guardians are to ensure that any medication the child is taking is delivered to mother who will then be responsible for seeing that said medication is taken. The Court orders Douglas Baker, Elida Baker, Jeanine Baker, and the child to participate in group or individual counseling through Comprehensive Youth Services as may be deemed appropriate. The Court further orders that the guardian, Douglas Baker contact Comprehensive Youth Services regarding counseling. Parties are ordered not to speak ill of one another around the child.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Continued from 2-4-13.</u></p> <p><u>Minute Order 2-4-13:</u> The Court directs the parties to participate in mediation today at 10:00 am.</p> <p><u>Note:</u> Substitution of Attorney filed 2-13-13 indicates that the Guardians are now represented by Attorney Cindy J. Hopper.</p> <p><u>Note:</u> Declaration filed 2-13-13 states that on 2-13-13, the Guardians filed an Adoption Request and a Petition to Declare Minor Free from Custody of Jeanine Baker and Stewart Hamby. Guardians request that the Court stay these proceedings pending final determination of that petition.</p>
Cont. from 020413		
Aff.Sub.Wit.		
✓ Verified		
Inventory		
PTC		
Not.Cred.		
✓ Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
✓ Pers.Serv. W		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
Reviewed by: skc		
Reviewed on: 2-13-13		
Updates: 2-14-13		
Recommendation:		
File 19 - Hamby		

<b>DOD: 09/24/2012</b>		<p><b>MARTIN MATA RODRIGUES</b>, friend/named executor without bond, is petitioner.</p> <p>Full IAEA – o.k.</p> <p>Will dated: 03/15/2012</p> <p>Residence: Fresno Publication: The Business Journal</p> <p><b>Estimated value of the Estate:</b> Total: <b>\$0</b></p> <p>Probate Referee: Rick Smith</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>The following issues still remain:</b></p> <ol style="list-style-type: none"> <li>The Will attached to the petition is for Johnnie Avis Bedrosian however the petition lists the decedent's name as John A. Bedrosian. Please clarify.</li> <li>Need original will to be deposited with the Court pursuant to Probate Code §8200(a)(1).</li> <li>#3g of the Petition was not answered regarding whether the proposed personal representative is a resident of California.</li> <li>Former Petition listed the estimated value of the estate at \$183,800.00 and the amended petition lists the estimated value at \$0. The Court may require clarification.</li> <li>Need Notice of Petition to Administer Estate for the Amended Petition.</li> <li>Need Proof of service of Notice of Petition to Administer Estate on the following: <ul style="list-style-type: none"> <li>Patrice Nagel</li> <li>Karen Spencer</li> <li>Mary Perch</li> <li>Nevart Antaramian</li> <li>George Bedrosian</li> </ul> </li> </ol> <p><b>Note: If the petition is granted status hearings will be set as follows:</b></p> <ul style="list-style-type: none"> <li><b>Friday, 07/12/2013 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <b>and</b></li> <li><b>Friday, 04/11/2014 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
<b>Cont. from 011713, 020813</b>			
<b>Aff.Sub.Wit.</b>	s/p		
✓ <b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>	x		
<b>Aff.Mail</b>	x		
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
✓ <b>Letters</b>			
✓ <b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
✓ <b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
<b>Reviewed by:</b> LV			
<b>Reviewed on:</b> 02/12/2013			
<b>Updates:</b>			
<b>Recommendation:</b>			
<b>File 20A - Bedrosian</b>			

<b>DOD: 09/24/2012</b>	<p><b>MARTIN MATA RODRIGUES</b>, friend/named executor, petitioned the Court for Appointment as Executor (See Page 2A).</p> <p><b>Minute Order of 02/08/2013:</b> No appearances. The Court sets the matter for an Order to Show Cause on 02/15/2013 regarding failure to appear and imposition of sanctions in the amount of \$100. The Court orders Catherine Amador to be personally present on 02/15/2013.</p> <p>Proof of Service indicates Attorney Amador was mailed a copy of the minute order on 02/08/2013.</p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<p><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 02/12/2013</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p>File 20B - Bedrosian</p>	

Atty **Rusca, Christopher M (for Objector/father Marcos Galvan**

Atty **Harris, Richard A. (for Petitioners Kenneth Roberts and Youngae Roberts)**

**Status**

<b>Saede age: 8</b>	<p><b>KENNETH ROBERTS</b> and <b>YOUNGAE ROBERTS</b>, maternal grandparents were appointed temporary guardians.</p> <p>Father (Saede): <b>MARCOS GALVAN</b> – Objects to the guardianship.</p> <p>Father (Jaeden): <b>OSRIS PULIDO</b> – consents and waives notice.</p> <p>Mother: <b>SARAH ROBERTS</b> – <i>deceased</i>.</p> <p><b>Background:</b> The minor's mother was murdered on 1/1/2012. At the time of her death mom had full custody of both her children.</p> <p>Petitioners allege that they took custody of the children upon the death of their mother. On January 2, 2012 Saede's father, Marcos Galvan demanded they turn Saede over to him. Petitioner state they refused and Mr. Galvan returned the next day with the Sheriff and Petitioners were forced to relinquish custody.</p> <p>Petitioners filed a Petition to be Appointed Guardian on 1/5/12. On 1/6/12 the court granted temporary guardians of the two children to Petitioners/maternal grandparents, Kenneth Roberts and Youngae Roberts.</p> <p>Jaeden's father, Osris Pulido, consented to the guardianship for his son, Jaeden.</p> <p>Saede's father, Marcos Galvan, objected to the appointment of a guardian for his daughter, Saede.</p> <p>The matter was set for a contested trial.</p> <p><b>Minute Order from the Settlement Conference on 1/28/13</b> states the Court Trial for 2/15/13 is taken off calendar and this status hearing was set.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>This matter is set to be heard at 10:00 a.m.</b></p> <p>1. Need current written status report pursuant to Local Rule 7.5.</p>
<b>Jaeden age: 4</b>		
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

**Reviewed by: KT**

**Reviewed on: 2/13/13**

**Updates:**

**Recommendation:**

**File 1 – Galvan & Roberts**