1 Betty Lou Amelino (CONS/E) **Case No. 06CEPR01291**

Atty Kharazi, H. Ty (for Objector Cathy Dunn Chappel)

Atty Motsenbocker, Gary (for Petitioner/Conservator Public Guardian)

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

Age: 76 years
DOB: 2/27/1935

Cont. from

	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	
✓	2620(c)	
✓	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

PUBLIC GUARDIAN, Conservator, is petitioner.

Account period: 7/24/09 – 7/31/11

Accounting - **$2,076,056.23**
Beginning POH - **$1,936,891.56**
Ending POH - **$1,921,307.31**
($187,407.05 is cash)

Conservator - **$2,817.04**
(11.69 Deputy hours @ $96/hr and 22.30 Staff hours @ $76/hr)

Attorney (County Counsel)- **$1,380.00** (9.2 hours @ $150/hr.)
Attorney (Motsenbocker) - **$4,995.00** (22.2 hours @ 225/hr)

Bond fee - **$10,380.28** (o.k.)

Petitioner prays for an Order:

1. Approving, allowing and settling the second account;
2. Authorizing the conservator and attorney fees and commissions;
3. Payment of the bond fee.

Objection to Second Account filed by Cathy Dunn Chappel on 2/7/12. Objector states the estate includes six real properties in Southern California. None of the income from these properties was reported during the account period. Correspondingly the account does not reflect any expenses associated with the properties. Objector has reason to believe that the properties are being managed by a real property management company which records should be procured and included in the accounting.

Objector also has concerns that the income from the real properties may not have been reflected in the Estate's tax returns and thus may cause a liability to the estate.

NEEDS/PROBLEMS/COMMENTS:

OFF CALENDAR.

Amended Second Account has been filed and is set for hearing on 3/29/12.

Reviewed by: KT
Reviewed on: 2/8/12
Updates:
Recommendation:
File 1 - Amelino

Dept. 303, 9:00 a.m. Tuesday, February 21, 2012

2 **Alberta L. Andrews (Estate)** **Case No. 08CEPR01015**

Atty **Ratzlaff, Ruth E. (for Dale Eugene Andrews – Son – Executor)**

Probate Status Hearing for Failure to File a First Account or Petition for Final Distribution (Prob. C. 12200, et seq); Failure to File Inventory and Appraisal

DOD:8-27-07		
	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	

DALE EUGENE ANDREWS, Son, was appointed Executor with Full IAEA without bond and Decedent's Will dated 2-18-02 was admitted to probate on 1-13-09. Letters issued on 3-6-09.

On 1-6-12, the Court set this status hearing for failure to file an Inventory and Appraisal and failure to file a first account or petition for final distribution.

Notice was mailed to Attorney Ruth E. Ratzlaff on 1-6-12.

As of 2-8-12, nothing further has been filed.

NEEDS/PROBLEMS/COMMENTS:

1. **Need Inventory and Appraisal.**
2. **Need account or petition for final distribution or current status report.**

<u>Note</u>: The original petition estimated the value of the estate at $200,000.00 (personal property only). The Court may require clarification as to the nature and status of the assets at this time. (Local Rule 7.5)

<u>Note</u>: The decedent's will is a pour-over will that devises the entire estate to the Trustee of the Alberta Andrews Living Trust dated 2-18-02.

Reviewed by: skc

Reviewed on: 2-8-12

Updates:

Recommendation:

File 2 - Andrews

Dept. 303, 9:00 a.m. Tuesday, February 21, 2012

3 Walter Biggers (CONS/PE) **Case No. 08CEPR01019**

Atty Bagdasarian, Gary G. (for Joan St. Louis – Daughter – Conservator)

(1) Third and Final Account and Report of Conservator; (2) for Authorization to Liquidate the Estate by Summary Disposition, and (3) for Termination of Conservatorship (Prob. C. 1860; 2620; 2623; 2630; 2631; and 2640)

DOD: 11-8-11		
	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	
✔	2620(c)	
✔	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

JOAN ST. LOUIS, Daughter and Conservator, is Petitioner.

Account period: 4-1-11 through 11-8-11

Accounting: $22,834.58
Beginning POH: $12,254.20
Ending POH: $12,686.47

Account period: 11-9-11 through 12-28-11

Accounting: $12,688.46
Beginning POH: $12,686.47
Ending POH: $0.00

Conservator: Waived

Attorney: There remains a balance due of attorney's fees and costs as ordered 7-7-11 in the amount of $5,886.60. As there are no funds remaining, no additional attorney's fees are requested.

As there are no funds remaining in the estate, Petitioner requests authorization to liquidate the conservatorship estate pursuant to Probate Code §13100, terminate the conservatorship, and discharge the bond.

NEEDS/PROBLEMS/COMMENTS:

<u>Note</u>: Need Ex Parte Petition for Final Discharge and Order (Mandatory Judicial Council Form GC-395) for final discharge of bond.

Reviewed by: skc
Reviewed on: 2-8-12
Updates:
Recommendation:
File 3 - Biggers

Dept. 303, 9:00 a.m. Tuesday, February 21, 2012

4 Velda Cooper (Estate) **Case No. 09CEPR00624**

Atty Helon, Marvin T. (for Denise Lovejoy – Daughter – Executor)

(1) Report of Executor and Petition for Instructions for Abandonment of Real Property Subject to Mortgage in Excess of Value, (2) for Allowance of Statutory Fees and Reimbursement of Costs and (3) for Final Distribution on Waiver of Accounting

DOD: 7-8-09		
	Aff.Sub.Wit.	
✔	**Verified**	
✔	**Inventory**	
✔	**PTC**	
✔	**Not.Cred.**	
✔	**Notice of Hrg**	
✔	**Aff.Mail**	W
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
✔	**Letters**	9-8-09
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
✔	**9202**	
✔	**Order**	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
✔	**FTB Notice**	

DENISE LOVEJOY, Daughter and Executor with IAEA without bond, is Petitioner.

Accounting is waived.

I&A: $472,000.00
POH: $339,526.16 ($2,526.16 is cash)

Executor (Statutory): Waived

Attorney (Statutory): $12,240.00

Costs: $1,819.00 (filing, certified letters, publication, probate referee)

Closing: $500.00

Petitioner and her sister agree and request that the Court approve abandonment of certain real property at 5704 W. Belmont in Fresno by offering to deed the property to the lender holding a security interest against the property in satisfaction of the secured debt and/or ceasing payments and allowing the property to be foreclosed upon.

Distribution pursuant to Decedent's will:

Denise Lovejoy: 50% undivided interest in the real and personal property of the estate remaining

Debra Cooper: 50% undivided interest in the real and personal property of the estate remaining

NEEDS/PROBLEMS/COMMENTS:

Reviewed by: skc

Reviewed on: 2-9-12

Updates:

Recommendation:

File 4 - Cooper

Dept. 303, 9:00 a.m. Tuesday, February 21, 2012

5 Pauline Elsie Bertram (Estate) **Case No. 10CEPR01059**

Atty Salazar, Steven F. (for James Clifford Bertram – Son – Executor)

(1) Petition for Settlement of First and Final Account, (2) Final Distribution, (3) Allowance of Statutory Compensation and Compensation for Extraordinary Services, Costs for Administration (Prob. C. 1060-1064, 10800, 10801, 10810, 10900, 10951, 11002, 11640)

DOD: 9-2-10		
	Aff.Sub.Wit.	
✔	Verified	
✔	Inventory	
✔	PTC	
✔	Not.Cred.	
✔	Notice of Hrg	
✔	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
✔	Letters	1-3-11
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
✔	9202	
✔	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
✔	FTB Notice	

JAMES CLIFFORD BERTRAM, Son and Executor with Full IAEA without bond, is Petitioner.

Account period: 9-3-10 through 11-30-11

Accounting: $77,061.43
Beginning POH: $75,210.35
Ending POH: $55,846.67 cash plus personal property valued at $500.00

Executor (Statutory): $2,682.46

Executor (Extraordinary): $555.00 (55.5 hours @$10.00/hr as itemized for various work related to the repair and sale of the residence)

Attorney (Statutory): $2,682.46

Costs: $1,255.00 (Filing, publication, probate referee, certified letters)

Closing: $1,200.00

Distribution pursuant to Decedent's will:

James Clifford Bertram: $28,483.05 plus a 60% undivided interest in Decedent's personal property valued at $500.00

Dorothy Irene Bandelian: $18,988.70 plus a 40% undivided interest in Decedent's personal property valued at $500.00

NEEDS/PROBLEMS/COMMENTS:

<u>Note</u>: Examiner interlineated the order to include distribution of the personal property valued at $500.00 pursuant to the consents filed 2-15-12.

Reviewed by: skc

Reviewed on: 2-9-12

Updates: 2-16-12

Recommendation:

File 5 - Bertram

Dept. 303, 9:00 a.m. Tuesday, February 21, 2012

6 **Jack Brothers Sudbury (Estate)** **Case No. 11CEPR00320**

Atty **Herold, Kim M. (for Petitioner/Executor Victoria Marie King)**

(1) First and Final Report of Status of Administration upon Waiver of Account and (2) Petition for Settlement thereof and (3) for Allowance of Statutory Attorneys' Compensation and (4) for Reimbursement of Costs Advanced and (5) for Final Distribution

DOD: 10/17/10		
Cont. from		
	Aff.Sub.Wit.	
✓	**Verified**	
✓	**Inventory**	
✓	**PTC**	
✓	**Not.Cred.**	
✓	**Notice of Hrg**	
✓	**Aff.Mail**	W/
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
✓	**Letters**	7/5/11
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
✓	**9202**	
✓	**Order**	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
✓	**FTB Notice**	

VICTORIA MARIE KING, Executor, is petitioner.

Accounting is waived.

I & A	-	**$175,000.00**
POH	-	**$175,000.00**
Executor	-	**waives**
Attorney (statutory)	-	**$6,250.00**
Costs (filing fees, certified copies, probate referee)	-	**$810.50**

Distribution, pursuant to Decedent's Will, is to:

Patricia Mae King - ½ interest in real property located at 457 W. Roberts Ave. in Fresno.

Victoria Marie King - ½ interest in real property located at 457 W. Roberts Ave. in Fresno.

NEEDS/PROBLEMS/COMMENTS:

Reviewed by: KT

Reviewed on: 2/9/12

Updates:

Recommendation: SUBMITTED

File 6 - Sudbury

Dept. 303, 9:00 a.m. Tuesday, February 21, 2012

7 **David M. Morita (Estate)** **Case No. 11CEPR00352**

Atty **Janian, Paulette (for Petitioners/Administrators Angela Morita and Christopher Morita)**

Petition for Final Distribution and for Allowance of Requested Attorney's Fees on Waivers of Accounting and Notice

DOD: 1/12/11		
Cont. from		
	Aff.Sub.Wit.	
✓	Verified	
✓	Inventory	
✓	PTC	
✓	Not.Cred.	
✓	Notice of Hrg	W/
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
✓	Letters	6/9/11
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
✓	9202	
✓	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
✓	FTB Notice	

ANGELA MORITA and **CHRISTOPHER MORITA**, Administrators, are petitioners.

Accounting is waived.

I & A - **$114,646.29**
POH - **$107,565.78**

Administrators - **waive**

Attorney - **$4,000.00** (less than statutory)

Closing - **$1,500.00**

Distribution, pursuant to intestate succession, is to:

Angela Morita - $13,532.89 and ½ interest in real property located at 4889 E. Butler in Fresno.

Christopher Morita - $13,532.89 and ½ interest in real property located at 4889 E. Butler in Fresno.

NEEDS/PROBLEMS/COMMENTS:

Reviewed by: KT
Reviewed on: 2/9/12
Updates: 2/16/12
Recommendation: SUBMITTED
File 7 - Morita

Dept. 303, 9:00 a.m. Tuesday, February 21, 2012

8 **John David Slater (CONS/PE)** **Case No. 11CEPR00699**

Atty **Knudson, David N. (Court-appointed for Conservatee)**

Petition for Payment of Fees to Court Appointed Attorney for Conservatee

	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**	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

DAVID N. KNUDSON, Petitioner, was Court-appointed to represent the Conservatee on 8-24-11.

The Fresno County Public Guardian was appointed Conservator of the Person and Estate on 9-14-11.

Petitioner requests fees in connection with his representation of the Conservatee for the petition to appoint a conservator.

Petitioner asks that he be paid $825.00 from the conservatorship estate for 3 hours @ $275.00/hr.

Services are itemized by date and include review of documents, visits with client, Court Investigator and correspondence with County Counsel, and court appearance.

NEEDS/PROBLEMS/COMMENTS:

Reviewed by: skc

Reviewed on: 2-9-12

Updates:

Recommendation:

File 8 – Slater

Dept. 303, 9:00 a.m. Tuesday, February 21, 2012

9 **Ronald J. Houde Revocable Trust 5/17/11 (Trust)** **Case No. 11CEPR01012**

Atty **Janian, Paulette (for Ruth Houde – Ex-Wife – Acting Trustee – Petitioner)**

Petition of Order Confirming Trust Assets [Probate Code 850 (A) (3)]

DOD: 5-22-11		
Cont. from 010412		
	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**	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

RUTH HOUDE, ex-wife and acting trustee, is Petitioner.

Petitioner states Decedent created this trust on 5-17-11, shortly before he died on 5-22-11. The Schedule of Trust Assets specifically designates three Bank of America accounts as trust assets; however, Decedent was unable to formally transfer these accounts to the trust before he died, as he was gravely ill with lung cancer.

Decedent resided in Los Angeles County, and also died there; however, Petitioner states the principal place of trust administration is Fresno County, as that is Petitioner resides in Selma and is the acting trustee.

Petitioner prays for an order:

1. That the Ronald J. Houde Revocable Trust dated May 17, 2011 is valid;

2. That the three Bank of America accounts are subject to the management and control of Petitioner as trustee.

NEEDS/PROBLEMS/COMMENTS:

<u>Note</u>: All issues previously noted have been addressed by the declaration filed 1-6-12 and Notice of Hearing filed 1-9-12.

Reviewed by: skc
Reviewed on: 2-8-12
Updates:
Recommendation:
File 9 - Houde

Dept. 303, 9:00 a.m. Tuesday, February 21, 2012

10 Harry Sager (CONS/PE) **Case No. 12CEPR00015**

Atty Kruthers, Heather H. (for Public Guardian – Petitioner)

Atty Standard, Donna M (Private Counsel for Harry Sager – Proposed Conservatee)

Petition for Appointment of Conservator

Age: 83

DOB: 5-10-28

	Aff.Sub.Wit.	
✔	Verified	
	Inventory	
	PTC	
	Not.Cred.	
✔	Notice of Hrg	
✔	Aff.Mail	W
	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	

TEMPORARY CONSERVATORSHIP OF THE PERSON ONLY EXPIRES 2-21-12

PUBLIC GUARDIAN is Petitioner and requests appointment as Conservator of the Person with medical consent powers and dementia medication and placement powers and as Conservator of the Estate.

Voting rights affected

Estimated Value of Estate:
Personal property: $36,139.00
Annual income: $26,856.36

Need Capacity Declaration.

Petitioner states Mr. Sager is 83 and lives independently in his home in Squaw Valley. His step-daughter and her husband, Rhonda and Ron Pack, have noticed changes since the death of his second wife in 2009, and Mrs. Pack believes he suffers from dementia. She describes incidents including forgetting to eat and not being able to find his way to and from her house. He refuses to see a doctor.

Due to his confusion and weight loss, the Public Guardian assets that conservatorship of his person with medical and dementia powers is necessary to ensure his health and well-being.

Petitioner states that a woman, Amee, has been able to exert undue influence over Mr. Sager and it appears he is a victim of financial elder abuse. He has stated that he wants to marry Amee and give her all his money and his house. The bank reported that he tried to add his wife Amee Sager to the account, and left angry when he was not allowed to do so. He later reported not remembering going to the bank.

The Public Guardian's Investigation Report was also filed confidentially.

Court Investigator Samantha Henson filed a report on 2-14-12.

NEEDS/PROBLEMS/COMMENTS:

Court Investigator advised rights on 1-30-12.

Voting rights affected
- Need Minute Order

Note: Attorney Deborah Boyett was originally appointed to represent Mr. Sager; however, at the hearing on temporary conservatorship on 1-17-12, Attorney Donna Standard advised the Court that she has been retained as counsel for Mr. Sager, and Attorney Boyett was relieved. A Petition for attorney's fees in connection with Attorney Boyett's services to that date is set for hearing on 3-13-12.

1. **Need Capacity Declaration and Dementia Attachment.**

Reviewed by: skc

Reviewed on: 2-9-12

Updates: 2-16-12

Recommendation:

File 10 - Sager

Dept. 303, 9:00 a.m. Tuesday, February 21, 2012

Age: 12 years **DOB: 12/28/99**		
Cont. from 091211, 011012		
	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	

STEPHANIE LASSLEY, Mother, was appointed Guardian of the Estate on 6/8/10 with all funds to be placed in a blocked account. Letters issued on 6/8/2010.

Inventory and appraisal filed on 1/4/11 shows the estate value at $676,276.36. ***(First account was for the account period ending 6/8/11 is now due.)***

Background:

On 11/24/10, Mother ("Guardian") filed a *Petition for Order Authorizing Minor's support from Estate Despite Liability of Oth*ers, stating:

- Guardian has returned to school to get her teaching credential through National University, and she works part time as a substitute teacher;
- When she works, she earns $90.00 per day or $45.00 per half day;
- In order to receive her teaching credential, Guardian will have to student teach for one year and will therefore be unable to work for that year;
- If Guardian is able to continue as scheduled, she is hoping to secure a job by the end of the 2012 school year, however this is not guaranteed.
- **Guardian's Petition requested an order:** authorizing the Guardian to support and maintain the minor out of the estate to the extent of $700.00 per month to be paid to the Guardian, for assistance with living costs until further order of the court, commencing on July 1, 2010 (the date upon which the court authorized distribution of the Estate of Shane W. Lassley, Case no. 09CEPR00554), for a total amount of $2,800.00 for the period of 7/1/10 to 10/31/09; and thereafter pay Stephanie Lassley the amount of $700.00 per month.

The *Petition* was heard on 1/24/11. Minute Order dated 1/24/11 states: The Court Grants the Petition and orders that the sum of $700.00 be paid until further order of the Court. Order is retroactive as of 7/1/10. The Court also set a status hearing for 9/12/11 for the Status of Guardian's employment.

Status report re Mom's Employment filed 01/31/12 states that Stephanie Lassley is currently working part time as a Certified Tutor with Fresno Unified School District. She has not been able to obtain a full time position yet. Further, she has picked up a few hours of additional tutoring through Fresno Unified's Ases program and she is able to sub in the afternoons occasionally. Ms. Lassely states that she and her daughters are budgeting carefully and could not make ends meet without the $1,400.00 stipend from the girls' accounts.

NEEDS/PROBLEMS/COMMENTS:

CONTINUED FROM 01/10/12

Reviewed by: JF
Reviewed on: 02/09/12
Updates:
Recommendation:
File 11 - Lassley

Age: 13 years DOB: 3/16/1998		
Cont. from 091211, 011012		
	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	

STEPHANIE LASSLEY, Mother, was appointed Guardian of the Estate on 6/8/10 with all funds to be placed in a blocked account. Letters issued on 6/8/2010.

Inventory and appraisal filed on 1/4/11 shows the estate value at $676,276.36. ***(First account was for the account period ending 6/8/11 is now due.)***

Background:

On 11/24/10, Mother ("Guardian") filed a *Petition for Order Authorizing Minor's support from Estate Despite Liability of Oth*ers, stating:

- Guardian has returned to school to get her teaching credential through National University, and she works part time as a substitute teacher;
- When she works, she earns $90.00 per day or $45.00 per half day;
- In order to receive her teaching credential, Guardian will have to student teach for one year and will therefore be unable to work for that year;
- If Guardian is able to continue as scheduled, she is hoping to secure a job by the end of the 2012 school year, however this is not guaranteed.
- **Guardian's Petition requested an order:** authorizing the Guardian to support and maintain the minor out of the estate to the extent of $700.00 per month to be paid to the Guardian, for assistance with living costs until further order of the court, commencing on July 1, 2010 (the date upon which the court authorized distribution of the Estate of Shane W. Lassley, Case no. 09CEPR00554), for a total amount of $2,800.00 for the period of 7/1/10 to 10/31/09; and thereafter pay Stephanie Lassley the amount of $700.00 per month.

The *Petition* was heard on 1/24/11. Minute Order dated 1/24/11 states: The Court Grants the Petition and orders that the sum of $700.00 be paid until further order of the Court. Order is retroactive as of 7/1/10. The Court also set a status hearing for 9/12/11 for the Status of Guardian's employment.

Status report re Mom's Employment filed 01/31/12 states that Stephanie Lassley is currently working part time as a Certified Tutor with Fresno Unified School District. She has not been able to obtain a full time position yet. Further, she has picked up a few hours of additional tutoring through Fresno Unified's Ases program and she is able to sub in the afternoons occasionally. Ms. Lassely states that she and her daughters are budgeting carefully and could not make ends meet without the $1,400.00 stipend from the girls' accounts.

NEEDS/PROBLEMS/COMMENTS:

CONTINUED FROM 01/10/12

Reviewed by: JF
Reviewed on: 02/09/12
Updates:
Recommendation:
File 12 - Lassley

13 Randi Taylour Robinson-Cervantes (GUARD/P) Case No. 10CEPR00724

Atty Pena, Elena K (pro per Petitioner/guardian)

Filing of Receipt for Blocked Account and Inventory & Appraisal

Age: 11 years **DOB: 10/31/2000**	**ELENA PENA,** sister, was appointed Guardian of the Person and Estate on 07/26/11 and Letters were issued on 07/28/11. An **Order to Deposit Money Into Blocked Account** was signed 07/26/11 ordering all funds of the minor to be placed in a blocked account. **Notice of Taking Possession or Control of an Asset of Minor or Conservatee filed 09/28/11 by Metlife Total Control Account** reflects that the guardian, Elena Pena, has taken control of the minor's assets in the amount of $211,865.50 from Metlife. **Receipt for Blocked Account filed on 1/11/12.** (Signed by the Guardian and not a bank official.) Inventory and Appraisal filed on 1/11/12 showing the estate valued at $244,116.64. (see note #3)	**NEEDS/PROBLEMS/COMMENTS:** **1. Receipt for Blocked Account for the funds held at Prudential Annuities was signed by the Guardian, Elena Pena and not the representative of Prudential Annuities as required. Need Amended Receipt for Blocked Account that is signed by the representative of Prudential Annuities.** **2. Receipt for Blocked Account for the funds held at MetLife was signed by the Guardian, Elena Pena and not the representative of MetLife as required. Need Amended Receipt for Blocked Account that is signed by the representative of MetLife.** **3. Assets listed on the Inventory and Appraisal were not appraised by the Probate Referee. If the assets are all cash (no mutual funds, stocks, bonds or other securities) then the probate referee's appraisal is not required. However, if the accounts listed include mutual funds, stocks, bonds or other securities then the probate referee must appraise those assets. Probate Code 8901. Need clarification of the nature of the assets listed.**
		Reviewed by: KT
		Reviewed on: 2/9/12
		Updates:
		Recommendation:
		File 13 – Robinson-Cervantes

	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	

Dept. 303, 9:00 a.m. Tuesday, February 21, 2012

14 Clyde & Asia Foster (GUARD/P) **Case No. 10CEPR00962**

Atty Washington, Tanya (pro per Petitioner/maternal aunt)

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

Asia age 12 years DOB: 2/27/1999		
Cont. from		
	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	N/A
	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	

Temporary Expires 2/21/2012

TANYA WASHINGTON, maternal aunt, is petitioner.

Father: **UNKNOWN** – *Declaration of Due Diligence filed on 12/19/11.*

Mother: **KIMBERLY LOFTIS –** *Court dispensed with further notice (unless mother's address becomes known) by minute order dated 1/3/12.*

Paternal grandparents: Unknown
Maternal grandfather: Felson Washington – *Consent and Waiver of Notice filed 12-27-11*

Maternal grandmother: Dorothy Washington – *Consent and Waiver of Notice filed 12-27-11*

Minor: Asia Foster – *Consent and Waiver of Notice filed 12-27-11*

Siblings: Shanae Williams, Te'asha Williams, Clyde Foster – *Consent and Waiver of Notice filed 12-27-11*

Petitioner states she needs to be able to make legal and medical decisions and to take her to the doctor when she gets sick.

Court Investigator Jennifer Daniel's Report filed on 2/14/12.

NEEDS/PROBLEMS/COMMENTS:

This petition is as to ASIA only. Guardianship of Clyde was previously granted to Petitioner Tanya Washington on 2/2/2011.

Reviewed by: KT
Reviewed on: 2/9/12
Updates: 2/16/12
Recommendation:
File 14 - Foster

Dept. 303, 9:00 a.m. Tuesday, February 21, 2012

15 Joshiah Montijo, Adrinah Torres and Aniya Torres (GUARD/P)

Case No. 11CEPR01107

Atty Pena, Juanita Lozano (pro per Petitioner/maternal grandmother)

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

Joshiah age: 11 years DOB: 6/16/2000		
Adrinah age: 6 years DOB: 9/8/2005		
Aniya age: 2 years DOB: 68/28/2009		
Cont. from		
	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**	
	Aff. Posting	
	Status Rpt	
✓	**UCCJEA**	
	Citation	
	FTB Notice	

TEMPORARY EXPIRES 2/21/12

JUANITA PENA, maternal grandmother, is petitioner.

Joshiah's father: **JOEY MONTIJO** – *Personally served on 2/3/12.*

Adrinah & Aniya's father: **GABRIEL TORRES** – *personally served on 12/21/11.*

Mother: **STEPHANIE LEON** – *consents and waives notice.*

Josiah's paternal grandfather: Joe Monjito – *served on 2/11/12.*
Josiah's paternal grandmother: Becky Monjito
Adrinah & Aniya's paternal grandfather: Robert Anthony Torres – *served on 12/27/11.*
Adrinah & Aniya's paternal grandmother: Cydney Perez – *served on 12/27/11.*
Maternal grandfather: George Leon – *deceased.*

Petitioner states mom is homeless and doing drugs. Joshiah's father is also using drugs. The Torres family, Adrinah and Aniya's paternal family are involved with the Bulldogs and other criminal activities.

Court Investigator Charlotte Bien's Report filed on 2/8/12.

NEEDS/PROBLEMS/COMMENTS:

1. **Need proof of service of the *Notice of Hearing* along with a copy of the Petition or *Consent and Waiver of Notice* or *Declaration of Due Diligence* on:**
   a. **Becky Monjito (Joshiah's paternal grandmother)**

Reviewed by: KT
Reviewed on: 2/9/12
Updates: 2/16/12
Recommendation:
File 15 – Montijo & Torres

Dept. 303, 9:00 a.m. Tuesday, February 21, 2012

16 Esther Shahbazian (Estate) **Case No. 12CEPR00027**

Atty Shahbazian, Steven L. (for Michael B. Shahbazian – Son – Petitioner)

Petition for Letters Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 11-23-11			**MICHAEL B. SHAHBAZIAN**, Son, is Petitioner and requests appointment as Administrator with Full IAEA without bond. All heirs waive bond. Full IAEA – ok Decedent died intestate Residence: Fresno Publication: Fresno Business Journal **Estimated value of estate:** Personal property: $ 10,000.00 Annual income: $ 50,000.00 Real property: $ 1,200,000.00 **Total: $ 1,250,000.00** Probate Referee: Rick Smith
	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**		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

NEEDS/PROBLEMS/COMMENTS:
Reviewed by: skc
Reviewed on: 2-9-12
Updates:
Recommendation: SUBMITTED
File 16 - Shahbazian

Dept. 303, 9:00 a.m. Tuesday, February 21, 2012

17 Armanii Tucker, K'anii Tucker, & Kayla Tucker (GUARD/P) Case No. 12CEPR00107

Pro Per **Gardner, Denise (Pro Per Petitioner, paternal grandmother)**

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Armanii Age: 14 yrs DOB: 3/7/1997		
K'anii Age: 7 yrs DOB: 4/9/2004		
Kayla Age: 2 yrs DOB: 2/26/2010		
Cont. from		
	Aff.Sub.Wit.	
✓	**Verified**	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	X
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
✓	**Pers.Serv.**	W/
✓	**Conf. Screen**	
	Aff. Posting	
✓	**Duties/Supp**	
	Objections	
	Video Receipt	
	CI Report	
	9202	
✓	**Order**	
✓	**Letters**	
	Status Rpt	
✓	**UCCJEA**	
	Citation	
	FTB Notice	

General Hearing set for4/3/2012

DENISE GARDINER, paternal grandmother, is Petitioner.

Father: **TARIK TUCKER**

Mother: **SHAMPALE YOUNG**; *personally served on 2/15/2012;*

Paternal grandfather: *Deceased*

Maternal grandfather: *Not listed*
Maternal grandmother: *Deceased*

Petitioner states the father is currently in Salvation Army Rehabilitation program, the mother is not caring for the children as she has a drug problem and she has totally neglected the three children. Petitioner states she offered to take the children and began caring for their needs and for the youngest child's medical issues, and she has enrolled the two older girls in school.

Petitioner attached a letter dated 2/3/2012 from Erika Mendoza of the Department of Children and Family Services stating that the mother made arrangements with the Petitioner for temporary care of the children; that the mother resides in an apartment that has a problem with mold and has been without electricity for several months; that the mother admitted to having a problem with drugs, and the father is currently in a program for drug addiction; and that the Petitioner has been advised by the Department of Children and Family Services to file for temporary guardianship of her grandchildren.

NEEDS/PROBLEMS/COMMENTS:

1. **Need *Notice of Hearing*.**
2. **Need proof of five (5) court days' notice by personal service of the *Notice of Hearing* and a copy of the *Petition for Appointment of Temporary Guardian*, or *Consent to Appointment of Guardian and Waiver of Notice*, or a *Declaration of Due Diligence* for:**
   - **Tarik Tucker, father;**
   - **Armanii Tycker, proposed ward (age14).**
3. ***UCCJEA* filed on 2/1/2012 provides no information regarding the periods and places of residence of the children other than indicating Petitioner's address without any dates of residence.**
4. **Item 3 of *Confidential Guardian Screening* form filed on 2/1/2012 is incomplete re: felony or misdemeanor.**

Reviewed by: LEG
Reviewed on: 2/10/12
Updates: 2/16/12
Recommendation:
File 17 - Tucker

Dept. 303, 9:00 a.m. Tuesday, February 21, 2012

18 Josiah Pena and Adam Pena (GUARD/P) **Case No. 12CEPR00108**

Atty Pena, Reina (Pro Per – Maternal Grandmother – Petitioner)

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Josiah Eriberto Pena
Age: 2
DOB: 8-3-09

Adam Pena
Age: 1
DOB: 8-6-10

	Aff.Sub.Wit.	
✔	**Verified**	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	X
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	X
✔	**Conf. Screen**	
✔	**Letters**	
✔	**Duties/Supp**	
	Objections	
	Video Receipt	
	CI Report	
	Clearances	
✔	**Order**	
	Aff. Posting	
	Status Rpt	
✔	**UCCJEA**	
	Citation	
	FTB Notice	

GENERAL HEARING: 4-4-12

REINA PENA, Maternal Grandmother, is Petitioner.

Father: **UNKNOWN**
Mother: **BELKIS PENA**

Paternal Grandfather: Unknown
Paternal Grandmother: Unknown
Maternal Grandfather: Unknown

Petitioner states the Mother left the children with her and she has not come back to see them or called. Petitioner states she has tried to locate the Mother and has spoken to her friend and her boyfriend's mother, but no one knows where she is. See Declarations of Due Diligence filed 2-1-12 and 2-2-12. According to the UCCJEA, the children have always lived with Petitioner.

NEEDS/PROBLEMS/COMMENTS:

1. ***If diligence is not found*, need Notice of Hearing and proof of personal service of Notice of hearing at least five court days prior to the hearing per Probate Code §2250(e) or consent and waiver of notice on:**
   - Belkis Pena (Mother)
   - Unknown father of Josiah
   - Unknown father of Adam

   ***Note*: Petitioner filed two Declarations of Due Diligence indicating efforts to locate Mother.**

   ***Note*: Petitioner states the fathers of both children are unknown, but does not provide further information.**

Reviewed by: skc
Reviewed on: 2-9-12
Updates:
Recommendation:
File 18 - Pena

Dept. 303, 9:00 a.m. Tuesday, February 21, 2012

19 Samantha Fay Stone, Christopher Owen Stone, Alexander Joe Stone, David Michael James Stone (GUARD/P)

Atty Wilson, Janet Marie (pro per – maternal grandmother/Petitioner)
Atty Mehall, Richard Martin (pro per – maternal step-grandfather/Petitioner)

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Samantha, 10 DOB: 09/17/01		
Christopher, 8 DOB: 04/03/03		
Alexander, 6 DOB: 07/26/05		
David, 6 months DOB: 08/06/11		
Cont. from		
	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	x
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	x
✓	Conf. Screen	
	Letters	x
✓	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	x
	Aff. Posting	
	Status Rpt	
✓	UCCJEA	
	Citation	
	FTB Notice	

TEMPORARY GRANTED EX PARTE; EXPIRES 02/21/12

GENERAL HEARING 04/05/12

JANET WILSON and **RICHARD MEHALL,** maternal grandmother and step-grandfather, are Petitioners.

Father (Christopher): **JOHN GILREATH** – *declaration of due diligence filed 02/03/12*

Father (all others): **UNKNOWN** – *declarations of due diligence filed 02/03/12*

Mother: **RUTHIE ANN STONE** – *declaration of due diligence filed 02/02/12*

Paternal grandparents (all): UNKNOWN

Maternal grandfather: DECEASED

Petitioner states that she has had the three oldest children in her care for the past six years, but the baby has been in his mother's care. Petitioner states that the mother is a drug addict and prostitutes herself to support her drug habit and leaves the baby with pimps and other drug users. Petitioners state that the mother has refused to let the baby live with them stating that she got sympathy when panhandling when she has the baby with her. Petitioner states that the last time she saw the baby he appeared lethargic and it appeared that his development has been stunted due to his mother's drug use (IV meth user) during her pregnancy and while breastfeeding. Petitioner states that the mother has been a drug user for 17 years and a prostitute for at least 10 years, she has a lengthy criminal history and has been offered rehab multiple times but always refuses. Petitioner states that she has contacted CPS numerous times about the baby, but they have been unable to make contact with the mother due to her living on the streets or moving from motel to motel. Fresno PD has been notified to be on the lookout for her and to do a well-baby check if they find her.

NEEDS/PROBLEMS/COMMENTS:

1. **Need *Notice of Hearing.***
2. **Need proof of personal service at least 5 court days before the hearing of *Notice of Hearing* with a copy of the *Petition for Temporary Guardianship* or Consent and Waiver of Notice for:**
   - John Gilreath (Christopher's Father) – *Declaration of Due Diligence filed 02/03/12* states that he was last seen in 2002-2003 in Madison, TN
   - Unknown fathers (other three children) – *Declarations of Due Diligence filed 02/03/12* states that all fathers are unknown except Christopher's.
   - Ruthie Ann Stone (mother) – *Declaration of Due Diligence filed 02/02/12* states that the mother has refused to provide her location or phone number. Petitioners have looked in the area where she is known to prostitute, but have not been able to locate her.

Reviewed by: JF	
Reviewed on: 02/09/12	
Updates:	
Recommendation:	
File 19 - Stone	

20 **Sally Villagran Quemada (CONS/PE)** **Case No. 12CEPR00021**

Atty **Lau, Nancy Quemada (Pro Per – Daughter of Conservatee)**

Notice to Appear for Reconsideration of Fee Waiver

Age:		
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	

NANCY QUEMADA LAU, temporary conservator, is Petitioner.

Petitioner submitted an application on 1/5/12 for Waiver of Court Fees and Costs in relation to her Petition for Conservatorship.

This Court granted the Waiver on 1/5/12.

On 2/8/12, the Court mailed Petitioner a *Notice to Appear for Reconsideration of Fee Waiver*, for hearing on 2/21/12 at 9:00 a.m. in Department 303, based on the following:

The Court has information that Petitioner's financial situation may have changed or that she may no longer be eligible for a fee waiver because based on information received by the Court, the Waiver Request filed on 1/5/12 appears to omit some household income.

NEEDS/PROBLEMS/COMMENTS:

Note: The Petition for Conservatorship was on calendar 2/16/12, and the court on its own motion granted a temporary conservatorship of the person in favor of Petitioner, to expire 3/29/12, as Petitioner's brother informed the Court he intends to hire counsel in objection to the Petition for Conservatorship. The next court date is 3/29/12, on the Petition for Conservatorship.

Reviewed by: NRN
Reviewed on: 2/9/12
Updates: 2/16/12
Recommendation:
File 20 - Quemada

Dept. 303, 9:00 a.m. Tuesday, February 21, 2012