



## 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.

Atty Matthai, Edith (for Craig A. Houghton – Objector)  
 Atty Manock, Charles K. (for George Salwasser/Executor of the Estate of Lillian Salwasser)  
 Atty Chielpegian, Michael S (for Marvin Salwasser/Administratoor with Will Annexed of Walter Salwasser Respondent)  
 Atty Wright, Janet L. (for George Salwasser/Executor)  
 Atty Farley, Michael L. (of Visalia, for Gary E. Salwasser - Beneficiary)

**Final Account and Petition for Distribution**

<b>Age:</b>	<p>George Salwasser is the Executor of the Estate. This hearing on Final Account and Petition for Distribution was set at the last 10/25/11 Status Hearing on the Amended and Restated First Account. Nothing has been filed since that last 10/25/11 hearing.</p> <p>By way of background, Executor’s Status Report filed before the last hearing, states the following:</p> <ul style="list-style-type: none"> <li>• <i>Status Report and Reply to Supplemental Response, filed 10/24/11, by George Salwasser:</i> The purpose of this hearing was to determine whether any further accounting would be necessary as the PrC §850 petitions of the Lillian Salwasser Estate and Walter Salwasser Estate were settled by Settlement Agreement and Release entered into on 6/21/11. Based on the Settlement terms it appears no further accounting should be required for any account reported in the pending <i>Account</i> for accounts held in Decedent or her surviving spouse’s names at the time of Decedent’s death. The Probate Estate Account (opened after Decedent’s date of death) and collections, if any, on Promissory Notes reported in the Account, would need to be supplemented through date of distribution (2 Notes are currently the subject of lawsuits); until there is determination as to the collectability on the Notes, tax matters cannot be finally determined. <b>A mediation is scheduled for 11/16/11 between George and Gary Salwasser; therefore, a continuance of 4 to 6 months is appropriate under the circumstances.</b></li> </ul> <p><u>As stated, the Court ordered and set for hearing the Final Account and Petition for Distribution.</u></p> <p><u>Need Final Account and Petition for Distribution.</u></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Note:</u> At the 10/25/11 Status Hearing on the Amended and Restated First Account, this Court set the matter of the Final Account and Petition for Distribution for 2/27/12.</p> <p><i>As of 2/17/12, nothing further has been filed in this matter.</i></p> <p>1. Need Final Account and Petition for Distribution</p>
<b>DOD:</b>		
<b>Cont. from 10-25-11</b>		
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><b>Reviewed by:</b> NRN</p> <p><b>Reviewed on:</b> 10/20/11</p> <p><b>Updates:</b> 10/24/11</p> <p><b>Recommendation:</b></p> <p><b>File 1 – Salwasser</b></p>		

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

<b>DOD: 02/28/07</b>	<p><b>JANET PICARD</b>, was appointed Executor with no IAEA authority on 02/05/08 and Letters were issued on 02/21/08.</p> <p><b>Notice of Status Hearing filed 10/05/11</b> set this matter for status. The Clerk’s Certificate of Mailing shows that the Notice of Status Hearing was mailed to Nancy Oehler, the Executor’s counsel, on 10/05/11.</p> <p><b>Status Report of Executor and Petition to Continue Estate Administration</b> was filed 10/31/11 by Executor, and states:          The Estate is not ready for distribution nor in a condition to be closed. The Petitioner has had some difficulty in ascertaining the assets of the decedent, however, an inventory of assets has now been prepared and submitted to the Probate Referee for valuation. The Petitioner estimates that it will need one year to close the administration of the estate and requests a continuance until November 2012.</p> <p><b>Inventory &amp; Appraisal filed 12/21/11.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>CONTINUED FROM 12/21/11</b>          Minute order from 12/21/11 hearing states: Rick Smith, appraiser, has asked for additional information.</p> <p><b>1. Need First Account and Petition for Final Distribution.</b></p> <p><b>Note:</b>          See Page 6 for a related matter.</p>
<b>Cont. from 11-14-11</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<input checked="" type="checkbox"/> <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> JF</p> <p><b>Reviewed on:</b> 02/16/12</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 2 - Picard</b></p>

	<p><b>CRAIG ELIOT SHAMPHAN</b>, son, was appointed Executor on 12-17-08.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
<p><b>DOD: 8-1-08</b></p>	<p><b>Background:</b> The estate consists of the decedent’s residence and minimal cash. The two heirs are Executor (son) and Debby Kay Doyle (daughter). Executor filed a Petition for Final Distribution on 5-15-09 that proposed distribution of the residence in undivided interests to himself and his sister; however, per Minute Order 8-10-09, Ms. Doyle did not want the undivided interest, and the real property was to be placed for sale. The petition was denied and dismissed and status hearing was set for the filing of the next accounting on 8-2-10. On 8-2-10, the court requested information about the listing.</p>	<p><b>Note:</b> This is the <u>11<sup>th</sup></u> hearing originating from Executor’s Petition for Final Distribution filed 5-15-09 (<u>almost 3 years ago</u>) that proposed distribution of minimal cash and undivided 50% interests in the residence to the two heirs.</p>
	<p><b>Declaration 2-22-11</b> states the property was first listed in September 2009 for \$150,000.00. That listing was extended and was to expire 3-24-11. The list price was reduced to \$125,000.00; however, per the Executor, the property had not been shown since the reduction, and no offers received. This may be due to the current poor housing market and recent bad weather. Ms. Doyle spoke with Attorney Burnside of DAK and indicated she was considering taking title to the property with her brother as tenants-in-common. Ms. Doyle further indicated she would get back to Attorney Burnside after speaking with her tax advisor; however, Ms. Doyle has not yet indicated what she plans to do. The property is listed in the Fresno MLS online database and on the London Properties website, and a “For Sale” sign has been posted in the front yard.</p>	<p><b>Minute Order 11-14-11:</b> Ms. Burnside estimates the property to be \$97K. No offers have been made. The heir lives in NY, and does not wish to retain CA property. The executor, Craig Shamphan, has allotted more time in the evening(s) for showing of the property. If the property is not sold, the Court may entertain distribution. Ms. Burnside is allowed to lower the price of the property without court approval. Matter continued to 2-27-12.</p>
<p><b>Cont. from 110810, 022811, 060611, 080111, 101711, 111411</b></p>	<p><b>On 2-28-11</b>, the court ordered the price reduced to \$100,000.00 and stated if a real estate professional deems it to be a higher price, the court will entertain it.</p>	
<p><input type="checkbox"/> <b>Aff.Sub.Wit.</b></p>	<p><b>Declarations of Leigh Burnside filed 5-27-11 and 5-31-11</b> state the Executor entered into a new listing agreement with Century 21 Adanalian &amp; Vasquez that expires 7-27-11 for \$105,000.00 (attached). The house is listed in the Fresno MLS online database and there is a For Sale sign in the front yard; however, the house has not been shown and no offers have been received. Attorney Burnside states Mr. Shamphan understood the court’s order to list the house for \$100,000.00 allowed the higher listing price, and acted on the advice of his agent without review by Attorney Burnside.</p>	<p><b>Updates:</b></p>
<p><input type="checkbox"/> <b>Verified</b></p>	<p><b>On 6-6-11</b>, Counsel informed the court that the property is currently listed at \$105,000.00, and the court advised counsel that it will allow a price of \$100,000.00 or \$99,950.00, and continued the matter to 8-1-11.</p>	<p><b>Contacts:</b> Reviewed 2-17-12</p>
<p><input type="checkbox"/> <b>Inventory</b></p>	<p><b>Declaration of Leigh Burnside filed 7-26-11</b> states that after the price was reduced to \$99,950.00, a number of prospective buyers have visited the property. The listing agreement expired 7-27-11, but was renewed for six months, and the agent has recommended a price reduction to \$97,000.00. <u>Attorney Burnside confirmed with heir Debby Doyle that she wants the property sold, and does not want to take a one-half interest in it.</u></p>	<p><b>Recommendation:</b></p>
<p><input type="checkbox"/> <b>PTC</b></p>	<p><b>SEE PAGE 2</b></p>	<p><b>Reviewed by:</b> skc</p>
<p><input type="checkbox"/> <b>Not.Cred.</b></p>		<p><b>File 4 - Shamphan</b></p>
<p><input type="checkbox"/> <b>Notice of Hrg</b></p>		
<p><input type="checkbox"/> <b>Aff.Mail</b></p>		
<p><input type="checkbox"/> <b>Aff.Pub.</b></p>		
<p><input type="checkbox"/> <b>Sp.Ntc.</b></p>		
<p><input type="checkbox"/> <b>Pers.Serv.</b></p>		
<p><input type="checkbox"/> <b>Conf. Screen</b></p>		
<p><input type="checkbox"/> <b>Letters</b></p>		
<p><input type="checkbox"/> <b>Duties/Supp</b></p>		
<p><input type="checkbox"/> <b>Objections</b></p>		
<p><input type="checkbox"/> <b>Video Receipt</b></p>		
<p><input type="checkbox"/> <b>CI Report</b></p>		
<p><input type="checkbox"/> <b>9202</b></p>		
<p><input type="checkbox"/> <b>Order</b></p>		
<p><input type="checkbox"/> <b>Aff. Posting</b></p>		
<p><input checked="" type="checkbox"/> <b>Status Rpt</b></p>		
<p><input type="checkbox"/> <b>UCCJEA</b></p>		
<p><input type="checkbox"/> <b>Citation</b></p>		
<p><input type="checkbox"/> <b>FTB Notice</b></p>		

Status Report filed 10-7-11 states: The property has been listed for \$97,000.00; however, the only offer received was for \$64,000.00 and was deemed unreasonable and rejected. The Executor reported that the declining neighborhood where the property is located appears to be the cause of the lack of offers for the property at the current price-point. The agent reported that he believes the property is competitively priced, but has “requested the executor permit him to show the home during expanded hours” and the Executor agreed.

Status Rerport filed 11-7-11 states: The listing agreement has been extended to 1-16-12. There have been no serious offers.

Status Report filed 2-16-12 states: The house is currently listed for \$95,000.00. The listing agreement expires 3-29-12. An offer was received for \$90,000.00 with seller to pay closing costs. Seller countered with \$95,000.00 without paying closing costs, and the counter offer was rejected by the buyer. The agent feels it is priced competitively.

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Age: 9 years DOB: 6/22/2002	<p><b>MELISSA RUSSELL</b>, guardian, is petitioner.</p> <p>Account period: 9/30/10 – 9/30/11</p> <p>Accounting - <b>\$70,563.79</b>                  Beginning POH - <b>\$0</b>                  Ending POH - <b>\$70,151.29</b></p> <p>Attorney - not addressed</p> <p>Guardian - not addressed</p> <p><b>Petitioner prays:</b></p> <p>1. The first account and report be approved and settled;                  2. The acts of the guardian shown in the accounting and report be approved.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Continued from 12/12/11. As of 2/16/12 the following issues remain:</p> <p>1. Need <i>Notice of Hearing</i>.</p> <p>2. Pursuant to Probate Code 2626 need proof of service of the <i>Notice of Hearing</i> on:                  a. Rebecca Lee Ann Dell Pitkin (minor)</p> <p>3. Need Order</p>
Cont. from 112811 121211		
Aff.Sub.Wit.		
✓ Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg X		
Aff.Mail X		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order X		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	Reviewed by: KT	
	Reviewed on: 2/16/12	
	Updates:	
	Recommendation:	
	File 5A - Pitkin	



<b>DOD: 05/25/10</b>		<p><b>JANET PICARD</b>, was appointed Executor with full IAEA authority and Letters were issued on 02/16/11.</p> <p><b>Notice of Status Hearing filed 10/05/11</b> set this matter for status. The Clerk’s Certificate of Mailing shows that the Notice of Status Hearing was mailed to Nancy Oehler, the Executor’s counsel, on 10/05/11.</p> <p><b>Status Report of Executor and Petition to Continue Estate Administration</b> was filed 10/31/11 by Executor, and states: The Estate is not ready for distribution nor in a condition to be closed. The Petitioner has had some difficulty in ascertaining the assets of the decedent, however, an inventory of assets has now been prepared and submitted to the Probate Referee for valuation. The Petitioner estimates that it will need one year to close the administration of the estate and requests a continuance until November 2012.</p> <p><b>Inventory &amp; Appraisal filed 12/22/11.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Note:</u> See Page 2 for a related matter.</p>
<b>Cont. from 111411</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input type="checkbox"/>	<b>Verified</b>		
<input checked="" 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:</b> JF</p> <p><b>Reviewed on:</b> 02/16/12</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 6 – Picard</b></p>	

First and Final Account and Report of Executor and (2) Petition for Final Settlement and Distribution (Prob. C. §§10800, 10810, 10831, 10900, 10951, 11640)

<b>DOD: 10/13/10</b>		<b>KIMBERLY R. W. BENNETTS,</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. <b>Kimberly R. W. Bennetts disclaimed his interest in the real property. The disclaimer acts as if the Kimberly pre-deceased the decedent. Therefore, if the Kimberly has issue, his issue would be entitled to the share of the estate the Kimberly disclaimed. Probate Code §275 et seq. The Court will need to know if Kimberly has issue prior to distribution.</b>  2. <b>Order does not comply with Local Rule 7.6.1.</b>
		Executor, is petitioner.	
		Accounting is waived.	
<b>Cont. from 121211</b>			
	Aff.Sub.Wit.	I & A - <b>\$113,976.64</b>	
✓	Verified		
✓	Inventory	Executor - <b>waives.</b>	
✓	PTC	Attorney - <b>\$4,419.30</b>	
	Not.Cred.	(statutory)	
✓	Notice of Hrg	Costs - <b>\$790.33</b>	
✓	Aff.Mail	(filing fee, publication, probate referee, certified copies)	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters	2/9/11	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
✓	FTB Notice		
		<b>Distribution, pursuant to Decedent's Will and Disclaimer is to:</b>	
		<b>Adrienne Vance</b> - real property, 1/2 of \$4,148.00, 1/2 of 5 shares of PG& E stock, 1/2 of 38.801 shares of PG& E stock, 1/2 of a 2000 Chevy, and 1/2 of the household furniture and furnishings.	
		<b>Kimberly R.W. Bennetts</b> - 1/2 of \$4,148.00, 1/2 of 5 shares of PG& E stock, 1/2 of 38.801 shares of PG& E stock, 1/2 of a 2000 Chevy, and 1/2 of the household furniture and furnishings.	
		<b>Reviewed by: KT</b>	
		<b>Reviewed on: 2/16/12</b>	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 7 - Bennetts</b>	

Age: 6 years DOB: 10/17/05	MELISSA RUSSELL, guardian, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 9/30/10 – 9/30/11	Continued from 12/12/11. As of 2/16/12 the following issues remain:
Cont. from 112811 121211	Accounting - \$70,563.79	<p>4. Need <i>Notice of Hearing</i>.</p> <p>5. Pursuant to Probate Code 2626 need proof of service of the <i>Notice of Hearing</i> on:                  b. Eva Jane Carolyn Pitkin (minor)</p> <p>6. Need Order</p>
Aff.Sub.Wit.	Beginning POH - \$0	
✓ Verified	Ending POH - \$70,151.29	
Inventory	Attorney - not addressed	
PTC	Guardian - not addressed	
Not.Cred.		
Notice of Hrg X	<b>Petitioner prays:</b>	
Aff.Mail X	3. The first account and report be approved and settled;	
Aff.Pub.	4. The acts of the guardian shown in the accounting and report be approved.	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
✓ 2620(c)		
Order X		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 2/16/11
		Updates:
		Recommendation:
		File 8A – Pitkin

Age: 6 years DOB: 10/17/05.		<b>NEEDS/PROBLEMS/COMMENTS:</b>  Continued from 12/12/11.
Cont. from 112811 121211		
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: 2/16/12	
	Updates:	
	Recommendation:	
	File 8B – Pitkin	

**Probate Status Hearing Re: Failure to File Inventory and Appraisal**

		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><u>OFF CALENDAR</u></b></p> <p><b>Inventory &amp; Appraisal was filed</b></p> <p><b>02/08/12</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>		
<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: JF</b>
		<b>Reviewed on: 02/16/12</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 9 - Lozano</b>



**Order to Show Cause**

	<p><b>ANDREW CHAFFER</b>, trust beneficiary, petitioned the Court for Removal of Trustee, Account and Appointment of Successor Trustee.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
	<p>Petitioner alleges <b>DOUGLAS EDWARD CHAFFER</b> is the current Trustee of the Trust.</p>	
<b>Cont. from</b>	<p><b>Minute Order from the Petition for Removal of Trustee, Account and Appointment of Successor Trustee dated 12/12/11</b> states the Court orders Douglas Chaffer to be present on 2/27/12. The Court further orders Douglas Chaffer to produce a copy of the Harley E. Chaffer Trust of May 9, 1991 and all amendments to it as well as all accounts regarding the trust property. Douglas Chaffer is ordered to provide a copy of the trust to counsel John Streett.</p> <p><b>Order to Appear and Produce Documents was signed on 1/9/12</b> ordering Douglas Chaffer to personally appear on 2/27/12. Prior to his appearance on 2/27/12 Douglas Chaffer will produce to attorney John Streett a copy of the Harley E. Chaffer Trust executed May 9, 1991 and any amendments to it.</p> <p>Prior to 2/27/12, Douglas Chaffer will produce to Petitioner’s attorney, copies of records of any and accounts or assets connected to the Harley E. Chaffer Trust.</p> <p>A copy of the Order was mailed to Douglas E. Chaffer on 1/15/2012.</p>	
<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: KT</b></p>
	<p><b>Reviewed on: 12/17/12</b></p>	
	<p><b>Updates:</b></p>	
	<p><b>Recommendation:</b></p>	
	<p><b>File 10B – Chaffer</b></p>	

Probate Status Hearing Re: Status on Payment of Applicable Transfer Fees to Complete Transfer to Orange County

	<p><b>GWENDOLYN HAVEN MATHIAS</b>, surviving settlor of the Robert Bruce Mathias and Gwendolyn Haven Mathias Family Trust dated 2/28/86, petitioned the Court to transfer the Trust to Orange County Superior Court.</p> <p>On January 6, 2011 the Court granted the petition and allowed the Trust to be transferred to Orange County Superior Court.</p> <p>On January 26, 2012 this status hearing was set for the status of applicable transfer fees to complete the transfer to Orange County.</p> <p>On 2/2/12 the appropriate fees were received.</p> <p>The Trust is currently in the process of being transferred.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</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: KT	
	Reviewed on: 2/17/12	
	Updates:	
	Recommendation:	
	File 11 - Mathias	

(1) Petition for Final Distribution on Waiver of Accounting and (2) for Allowance of Statutory (Prob. C. 10400-10406, 10954, 11600-11642)

<b>DOD: 07/23/10</b>		<b>MICHAEL TARASEVIC</b> , Executor, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>CONTINUED FROM 11/28/11</u> As of 02/16/12, no additional documents have been filed and following issues remain: 1. Petition does not make a statement regarding waiver of the accounting. Need Waiver of Accounting by Michael Tarasevic and Anthony Tarasevic or Accounting. 2. The Petition states that all debts of the decedent have been paid, however, a Creditor's Claim in the amount of \$52,340.63 was filed by California Business Bureau for Community Medical Center on 11/02/10. The Petition states that no action has been taken on this claim at this time, therefore this debt has not been resolved. Further, need Allowance or Rejection of Creditor's Claim (form DE-174) pursuant to Probate Code § 9250. <u>Distribution of estate assets cannot be made until all debts of the estate have been resolved.</u> 3. Also, a Creditor's Claim in the amount of \$1,408.00 was filed by American Infosource as agent for Bank of America on 11/09/10. The petition states that this claim was settled. Need Allowance or Rejection of Creditor's Claim (form DE-174) and satisfaction of Claim from Bank of America. 4. The Petition does not make a statement regarding the required notice to the Franchise Tax Board pursuant to Probate Code § 9202(c)(1).  Reviewed by: JF Reviewed on: 12/16/12 Updates: Recommendation: File 12 - Tarasevic
		I & A - \$135,867.00	
		POH - \$135,867.00	
<b>Cont. from 112811</b>			
	Aff.Sub.Wit.	Executor - waives	
✓	Verified		
✓	Inventory	<b>Distribution, pursuant to decedent's Will, is to:</b>	
✓	PTC		
✓	Not.Cred.		
✓	Notice of Hrg	Michael Tarasevic - \$58.50 cash, plus ½ interest in real property and ½ interest in a 1977 truck	
✓	Aff.Mail	w/	
	Aff.Pub.		
	Sp.Ntc.	Anthony Tarasevic - \$58.50 cash, plus ½ interest in real property and ½ interest in a 1977 truck	
	Pers.Serv.		
	Conf. Screen		
	Letters	11/30/10	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice	x	



(1) First and Final Account and Report of Executor, and (2) Petition for Final Distribution

<b>DOD: 08/08/10</b>		<b>LYNETTE CANAS</b> , Executor, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. No accounting is attached to the Petition. The Summary of Account on Page 5 references a Schedule A; however, no Schedule A is attached to the Petition. 2. Decedent’s Will devises \$2,000.00 to Darlene Hardin and Mason T. Wolfe, however, these specific bequests are not included in the proposed distribution of the estate. 3. Need order. <i>Note:</i> Pursuant to Local Rule 7.6.1 A – All orders or decrees in probate matters must be complete in themselves. Orders shall set forth all matters ruled on by the court, the relief granted, and the names of the persons, descriptions of property and/or amounts of money affected with the same particularity required of judgments in general civil matters. <u>Monetary distributions must be stated in dollars, and not as a percentage of the estate.</u>
		Account period: <b>08/08/10 – 01/05/12</b>	
<b>Cont. from</b>		Accounting - <b>\$187,109.88</b>	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - <b>\$182,825.57</b>	
<input checked="" type="checkbox"/>	Verified	Ending POH - <b>\$176,827.21</b>	
<input checked="" type="checkbox"/>	Inventory	Executor - <b>waives</b>	
<input checked="" type="checkbox"/>	PTC	Closing - <b>\$250.00</b>	
<input checked="" type="checkbox"/>	Not.Cred.	<b>Distribution, pursuant to Decedent’s Will, is to:</b>	
<input checked="" type="checkbox"/>	Notice of Hrg	Lynette D. Canas - 50% of the residual estate	
<input checked="" type="checkbox"/>	Aff.Mail	Gerald J. Wolfe - 50% of the residual estate	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters	02/16/11	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	9202		
	Order	x	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
			Reviewed by: JF
			Reviewed on: 02/16/12
			Updates:
			Recommendation:
			File 14 - Wolfe

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

<b>Age:</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b><u>OFF CALENDAR</u></b> <b>Inventory &amp; Appraisal filed 12/15/11</b>
<b>DOD:</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>		
		<b>Reviewed by: JF</b>
		<b>Reviewed on: 02/16/12</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 15 - Toppin</b>

**16A Nerine Amavisca, Noe Amavisca, Natalie Amavisca and Nadine Amavisca (GUARD/P)**

**Case No. 11CEPR00901**

Atty Gonzales, Yolanda (pro per Paternal grandmother/proposed guardian of Nerine and Natalie)  
 Atty Amavisca, Renee (pro per Petitioner/paternal aunt/proposed guardian of Noe and Nadine)  
 Atty Amavisca, Monica (pro per Objector/mother)

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

Nerine age: 10 years DOB: 4/6/01		<p style="text-align: center;"><b><u>TEMPORARY EXPIRES 12/12/11</u></b></p> <p><b>YOLANDA GONZALES</b>, paternal grandmother, is petitioner.</p> <p>Father: <b>SAMUEL AMAVISCA</b> – <i>deceased</i>.</p> <p>Mother: <b>MONICA AMAVISCA</b> – <i>present in court on 12/12/11</i>.</p> <p>Paternal grandfather: Samuel Amavisca                  Maternal grandfather: Rick Sandhu                  Maternal grandmother: Lupe Rios</p> <p>Petitioner states Petitioner states she feels it is in the best interest of the children that the Petitions (hers and Renee’s) be approved. Allowing the children to go back with their mother would put them in danger. Included are photographs that show mom’s everyday lifestyle. The pictures show her and others with guns. Her lifestyle is that of gangs, drugs, alcohol and neglect.</p> <p><b>Objections of Mother, Monica Amavisca filed on 10/19/11</b> states her husband died and she had to move out of her home because it was too much for them. She states she didn’t have a permanent place to live so she asked Yolanda to take the kids until she got her apartment. Yolanda agreed and now that she has the apartment they don’t want to give the kids back.</p> <p><b>Court Investigator Samantha Henson’s Report filed on 11/30/11.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>This petition is as to NERINE and NATALIE ONLY.</b></p> <p>Minute order dated 12/12/11 states the Court orders Court Investigator Samantha Henson to interview the mother and children and conduct further investigation of mother’s living conditions.</p> <ol style="list-style-type: none"> <li>1. <b>Need Notice of Hearing.</b></li> <li>2. <b>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:</b> <ol style="list-style-type: none"> <li>a. Samuel Amavisca (paternal grandfather)</li> <li>b. Rick Sandhu (maternal grandfather)</li> <li>c. Lupe Rios (maternal grandmother)</li> </ol> </li> <li>3. <b>UCCJEA is incomplete. Need residence information for the minors from 2006 to 11/24/10.</b></li> </ol> <p>Court Investigator Samantha Henson’s to provide supplemental report.</p>
Noe age: 9 years DOB: 8/18/02			
Natalie age: 4 years DOB: 7/19/07			
Nadine age 2 years DOB: 12/7/09			
Cont. from 121211			
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg X		
	Aff.Mail X		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed by: KT	
		Reviewed on: 2/17/12	
		Updates:	
		Recommendation:	
		File 16A - Amavisca	

**16B Nerine Amavisca, Noe Amavisca, Natalie Amavisca and Nadine Amavisca (GUARD/P)**

**Case No. 11CEPR00901**

Atty Gonzales, Yolanda (pro per Paternal grandmother/proposed guardian of Nerine and Natalie)  
 Atty Amavisca, Renee (pro per Petitioner/paternal aunt/proposed guardian of Noe and Nadine)  
 Atty Amavisca, Monica (pro per Objector/mother)

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

Nerine age: 10 years DOB: 4/6/01	<u><b>TEMPORARY EXPIRES 12/12/11</b></u>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
Noe age: 9 years DOB: 8/18/02	RENEE AMAVISCA, paternal aunt, is petitioner.	<b>This petition is as to NOE and NADINE ONLY.</b>
Natalie age: 4 years DOB: 7/19/07	Father: SAMUEL AMAVISCA – deceased.	Minute order dated 12/12/11 states the Court orders Court Investigator Samantha Henson to interview the mother and children and conduct further investigation of mother’s living conditions.
Nadine age 2 years DOB: 12/7/09	Mother: MONICA AMAVISCA – <i>present in court on 12/12/11.</i>	4. Need <i>Notice of Hearing</i> .
Cont. from 121211	Paternal grandfather: Samuel Amavisca Maternal grandfather: Rick Sandhu Maternal grandmother: Lupe Rios	5. Need proof of service of the <i>Notice of Hearing</i> along with a copy of the Petition or consent and waiver of notice or declaration of due diligence on:
<input checked="" type="checkbox"/> Verified	Petitioner states she feels it is in the best interest of the children that the Petitions (hers and Yolanda’s) be approved.	d. Samuel Amavisca (paternal grandfather)
<input type="checkbox"/> Inventory	Allowing the children to go back with their mother would put them in danger.	e. Rick Sandhu (maternal grandfather)
<input type="checkbox"/> PTC	Included are photographs that show mom’s everyday lifestyle. The pictures show her and others with guns. Her lifestyle is that of gangs, drugs, alcohol and neglect.	f. Lupe Rios (maternal grandmother)
<input type="checkbox"/> Not.Cred.	<b>Objections of Mother, Monica Amavisca filed on 10/19/11</b> states her husband died and she had to move out of her home because it was too much for them. She states she didn’t have a permanent place to live so she asked Yolanda to take the kids until she got her apartment. Yolanda agreed and now that she has the apartment they don’t want to give the kids back.	6. UCCJEA is incomplete. Need residence information for the minors from 2006 to 11/24/10.
<input type="checkbox"/> Notice of Hrg X	<b>Court Investigator Samantha Henson’s Report filed on 11/30/11.</b>	Court Investigator Samantha Henson’s to provide supplemental report.
<input type="checkbox"/> Aff.Mail X		
<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		
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: KT
		Reviewed on: 2/17/12
		Updates:
		Recommendation:
		File 16B - Amavisca

**17 Jaylen Inez Ortiz & Agustin Jayden Leon (GUARD/P) Case No. 12CEPR00145**

Atty Villagomez, Guadalupe Garcia (pro per – paternal aunt/Petitioner)

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

Jaylen, 3 DOB: 05/11/08	<p align="center"><b><u>GENERAL HEARING 04/11/12</u></b></p> <p><b>GUADALUPE GARCIA VILLAGOMEZ</b>, paternal aunt, is Petitioner.</p> <p>Father: <b>JOSE AGUSTIN LEON</b> – <i>incarcerated</i></p> <p>Mother: <b>ROSEANA ORTIZ</b> – <i>currently incarcerated</i></p> <p>Paternal grandfather: AGUSTIN LEON Paternal grandmother: PETRA GARCIA AUMADA</p> <p>Maternal grandfather: DECEASED Maternal grandmother: IRENE ORONA</p> <p>Siblings: ALFREDO LEON, ALYSSA ORTIZ</p> <p>Petitioner states that the father is serving a life sentence and the mother was recently incarcerated, leaving no one to care for the minors. Petitioner states that the mother is a drug abuser and the home the children were living in with her was filthy and unfit for children. Petitioner states that she can provide a stable and loving environment for the children.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Fee waiver was denied on 02/14/12. Filing fees in the amount of \$265.00 is due.</li> <li>2. UCCJEA is incomplete. Need children’s residence address from birth to 02/06/12.</li> <li>3. Need <i>Notice of Hearing</i>.</li> <li>4. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Temporary Guardianship or Consent and Waiver of Notice or Declaration of Due Diligence</i> for: <ul style="list-style-type: none"> <li>- Jose Agustin Leon (father)</li> <li>- Roseana Ortiz (mother)</li> </ul> </li> </ol>
Agustin, 2 DOB: 05/19/09		
Cont. from		
Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg <span style="float:right">x</span>		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv. <span style="float:right">x</span>		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
Citation		
FTB Notice		
Reviewed by: JF		
Reviewed on: 02/16/12		
Updates:		
Recommendation:		
File 17 – Ortiz & Leon		