



*Declaration of Susan Cervantes filed 1/9/2012* states she did not realize the Thrift Savings Plan funds she was using were to be held in a blocked account; that she and the Co-Guardian have purchased things for the minor over the years and the costs have far exceeded the **\$10,769.85**; and she apologizes to the Court for the error.

*Declaration of Jordan Strickland filed 1/9/2012* states he went to CITIBANK after his 18<sup>th</sup> birthday and requested to withdraw money from his account, and the bank allowed him to open a personal account and transfer money from the guardianship account into a checking account; he is the only person who has withdrawn money from the account, and his grandparents and court-appointed Guardians have not taken any money from the account; he also went to CHASE bank to withdraw his money and that bank told him he needed a court order and would not release any money to him without a court order; he did not know that he could not use the money or take the money out of the accounts without a court order; he apologizes to the Court if he has done anything wrong, as he thought the money was his and that he could use it how he wanted.

**Petitioners request** that the guardianship be terminated as the former ward attained the age of 18 years on 8/9/2010; Petitioners request that they be discharged as Guardians of the Person and Estate of the former ward.

**Petitioners pray for an Order:**

1. Settling and allowing the First and Final Account and report and confirming the acts of the Petitioners and Guardians of the Estate for the account period;
2. Authorizing Petitioners to pay the attorney fees and reimbursement of costs advanced;
3. Discharging the Petitioners as Guardians of the Estate; and
4. Authorizing Petitioners to deliver the property remaining in their possession to Jordan Everett Strickland, and to facilitate this delivery, authorizing the unblocking of the Chase bank account and the Citibank account.

(1) Second and Final Account and Report of Administrator and Petition for Its Settlement, (2) for Allowance of Compensation to Attorney for Ordinary Services, and (3) for Final Distribution (Prob. C. 10902 and 10950)

<b>DOD: 10/11/2003</b>	<b>IRMA LOZANO</b> , daughter and Administrator with Full IAEA without bond appointed on 1/2/2007, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>					
	Account period: 1/11/2011 – 1/23/2012	<p><b>1. Need proposed order.</b></p>					
<b>Cont. from</b>	Accounting - <b>\$215,500.00</b>						
<input type="checkbox"/> <b>Aff.Sub.W</b>	Beginning POH - <b>\$215,500.00</b>						
<input checked="" type="checkbox"/> <b>Verified</b>	Ending POH - <b>\$ 13,258.64 (all cash)</b>						
<input checked="" type="checkbox"/> <b>Inventory</b>	Administrator - <b>waives</b>						
<input checked="" type="checkbox"/> <b>PTC</b>	Administrator's Claim - <b>\$6,673.54</b>						
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	(partial payment of \$20,549.49 Creditor's Claim documented in Attachments 1 through 6 to the First Account and Report filed 1/11/2011; for payment of property taxes, insurance, utilities/water/power, house maintenance/yard, and funeral expenses;)						
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Attorney - <b>\$4,500.00</b>						
<input checked="" type="checkbox"/> <b>Aff.Mail</b> W/O	(less than statutory of \$7,310.00)						
<input type="checkbox"/> <b>Aff.Pub.</b>	Costs - <b>\$2,085.10</b>						
<input checked="" type="checkbox"/> <b>Sp.Ntc.</b>	(filing fees, certified copies, publication, probate referee, appearance fee in litigation matter;)						
<input type="checkbox"/> <b>Pers.Serv.</b>	<b>Petitioner states:</b>						
<input type="checkbox"/> <b>Conf. Screen</b>	<ul style="list-style-type: none"> <li>During the period of the account, Petitioner sold the real property residence in Selma for <b>\$75,000</b> (<i>Seller's Final Closing Statement attached as Exhibit B</i>), on <u>6/15/2011</u> after years of having the property on the market; the sale price was fair even though much less than the valuation of <b>\$215,000</b>, and the sale was proceeded by <i>Notice of Proposed Action</i> to all heirs;</li> <li>Petitioner also settled all claims of the Department of Health Services for the discounted amount of <b>\$50,000</b> [<i>Dismissal of Creditor's Claim and Withdrawal of Request for Special Notice</i> was filed on 7/5/2011];</li> </ul>						
<input type="checkbox"/> <b>Letters</b> 010207							
<input type="checkbox"/> <b>Duties/S</b>							
<input type="checkbox"/> <b>Objections</b>							
<input type="checkbox"/> <b>Video Receipt</b>							
<input type="checkbox"/> <b>CI Report</b>							
<input checked="" type="checkbox"/> <b>9202</b>							
<input type="checkbox"/> <b>Order</b> X							
<input type="checkbox"/> <b>Aff. Post</b>							
<input type="checkbox"/> <b>Status Rpt</b>							
<input type="checkbox"/> <b>UCCJEA</b>							
<input type="checkbox"/> <b>Citation</b>							
<input checked="" type="checkbox"/> <b>FTB Notice</b>							
	~Please see additional page~	<table border="1"> <tr> <td><b>Reviewed by:</b> LEG</td> </tr> <tr> <td><b>Reviewed on:</b> 2/21/12</td> </tr> <tr> <td><b>Updates:</b></td> </tr> <tr> <td><b>Recommendation:</b></td> </tr> <tr> <td>File 2 - Lazono</td> </tr> </table>	<b>Reviewed by:</b> LEG	<b>Reviewed on:</b> 2/21/12	<b>Updates:</b>	<b>Recommendation:</b>	File 2 - Lazono
<b>Reviewed by:</b> LEG							
<b>Reviewed on:</b> 2/21/12							
<b>Updates:</b>							
<b>Recommendation:</b>							
File 2 - Lazono							

**Petitioner states, continued:**

- Petitioner paid out of her own funds **\$1,400** to settle an individual's claim against the estate;
- Petitioner submitted a claim against the estate for **\$20,549.49**, documented in full as *Attachments 1 through 6* to the *First Account and Report* filed 1/11/2011 [*Order Settling First Account and Report of Administration was signed 4/7/2011*]; Petitioner was not reimbursed at the time of the first account, and requests **\$6,673.54** of the total amount she expended be reimbursed to her;
- While Petitioner has made other payments in the last year on behalf of the estate, she is not seeking reimbursement for any of those expenditures; there are insufficient funds to reimburse her for the expenditures;
- Items of household furniture valued at **\$500.00** on the *Inventory and Appraisal* were not realistically saleable and so were given to heirs who wanted them and were in position to take them;
- There will be no distribution to any of the Decedent's heirs because [there are insufficient funds], even with the waiver of compensation by Petitioner as Administrator, a significant reduction in attorney's fees for the probate action, and no charging of attorney's fees in connection with the separate lawsuit with the Department of Health Care Services [10CECG02260].

**Petitioner prays for an Order:**

1. Settling, allowing and approving the *First Account* of Petitioner as Administrator, and confirming and approving all acts and proceedings of Petitioner as Administrator;
2. Authorizing and directing Petitioner to pay the attorney's compensation of **\$4,500.00** and reimbursement of **\$2,085.10** costs advanced by the attorney;
3. Authorizing Petitioner to pay herself **\$6,673.54** as satisfaction of her claim as creditor of the estate;
4. Distributing any other property of Decedent or the estate not now known or discovered to the persons entitled to it, Decedent's children, as follows: 1/5<sup>th</sup> each Eugenio Lozano, Rosanelia Garcia, Richard Lozano, Mary Helen Jasso, and Irma Lozano; and
5. Discharging and releasing Petitioner from all liability to be incurred hereafter upon the filing of receipts [*Examiner added: and approval of an Ex Parte Petition for Final Discharge and Order.*]

Atty Hernandez, Teresa (pro per Guardian)  
 Atty Attashian, Zepure (for Petitioner/mother Eliza Frausto)

**Respondent's Notice of Motion and Application to Reconsider and Revocation of Order Re: Supervised Visits, and Retroactive Stay of Proceedings, Alternatively, a Request to Participate in Court Investigation Regarding Modification of Visitation, Memorandum of Points and Authorities and Declaration of Respondent in Support**

Erika age: 7 years DOB: 9/21/04	<p><b>ELIZA FRAUSTO</b>, mother, is petitioner.</p> <p><b>TERESA HERNANDEZ</b>, paternal grandmother, was appointed guardian on 2/9/2009.</p> <p><b>Petitioner requests</b> this Court reconsider its order of 1/4/2012 modifying the visitation.</p> <p><b>Petitioner states</b> on 5/21/2009, the Guardian Teresa Hernandez filed and served a Citation and Petition to Declare the Minors Free from mother's custody (case nos. 09CEFL03194, 03199, 03200).</p> <p>The petition to terminate the mother's parental rights is pending.</p> <p>On January 4, 2012 mother states she appeared in this court on a Petition to Modify the Guardianship Visitation Orders from unsupervised to supervised. The Court, unaware of the pending Petition to Declare the Minor Child Free from Mother's Care, modified the visitation orders.</p> <p>Petitioner alleges as a result of the pending termination, the guardianship orders are stayed and cannot be modified. Accordingly she is requesting the Court vacate its 1/4/2012 order and reinstate the previous visitation orders pending resolution of the pending termination of her parental rights.</p> <p>Alternatively, Petitioner asks that the court refer Teresa (guardian) and mother to an additional assessment with a Court Investigator. Mother alleges the current visitation order providing her with supervised visits only, are unjustified.</p> <p>Petitioner states during their last few visits the children have been begging her to take them home for the visits. They are not comfortable with Teresa supervising the visits. Petitioner states the children's safety, health and wellbeing are her first priority.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. <i>Need Notice of Hearing.</i></li> <li>2. <i>Need proof of service of the Notice of Hearing on:</i> <ol style="list-style-type: none"> <li>a. <b>Teresa Hernandez (guardian/paternal grandmother) <u>Note:</u></b>                      A proof of service was filed showing service of the Notice of Motion and supporting documents, however a <i>Notice of Hearing</i> has not been filed.</li> </ol> </li> <li>3. <b>Need Order</b></li> </ol>
Logan age: 5 years DOB: 2/25/07		
Jaydin age: 3 years DOB: 7/28/08		
Cont. from		
Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		X
Aff.Mail		
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:** 2/21/12.

**Updates:**

**Recommendation:**

**File 3 - Hernandez**

Atty Cross, Robert W. M., sole practitioner of Selma (for Petitioner Rebba Workmon)

(1) First and Final Report of Executor on Waiver of Account and (2) Petition for Allowance of Compensation to Attorney for Ordinary Services and for (3) Final Distribution

<b>DOD: 6/1/2009</b>		<b>REBBA WORKMON</b> , daughter and Executor with Full IAEA without bond appointed on 5/18/2010, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>1. Proposed order does not comply with Local Rule 7.6.1(A) providing that monetary distributions must be stated in dollars, and not as a percentage of the estate. Need revised proposed order containing the dollar amount to be distributed to each distributee, along with the percentage to each of the Note secured by Deed of Trust.</b></p> <p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 2/21/12</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 4 – Powell</b></p>
		Accounting is waived.	
<b>Cont. from</b>		I & A - <b>\$312,007.29</b>	
<b>Aff.Sub.W</b>		POH - <b>\$286,071.57</b> ( <i>\$284,451.57 is cash</i> )	
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>	Executor - <b>waives</b>	
<input checked="" type="checkbox"/>	<b>PTC</b>		
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>	Attorney - <b>\$5,500.00</b> ( <i>less than statutory of \$9,240.15; Note: Petition calculates statutory fees based upon a loss on the sale of the real property; no loss should be included, as payment of seller's costs are not considered a loss;</i> )	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	Costs - <b>\$1,152.40</b> ( <i>filing fees, probate referee, publication, certified copies</i> )	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>	<b>Petitioner states:</b>	
	<b>Conf. Screen</b>	<ul style="list-style-type: none"> <li>Petitioner took the following actions with close communication with <b>CAROLYN E. KENDRICK</b>, the other distributee: sold motor home for its inventoried value of <b>\$100</b>; sold pickup truck for its inventoried value of <b>\$13,000</b> to Carolyn Kendrick by receipt in the estate of <b>\$5,000</b> cash and by receipt of the Petitioner of an old tractor; Petitioner and Carolyn Kendrick disposed of other personal property jointly by mutual agreement;</li> <li>Petitioner sold the real property residence located at 6726 E. Clarkson in Selma for its appraised value of <b>\$160,000</b> in July 2011 following service of <i>Notice of Proposed Action</i> and written consent of Carolyn Kendrick;</li> <li>A Note with an inventoried value of <b>\$4,110.67</b> secured by a Deed of Trust on the real property located at 15528 S. Hughes has now been paid down to <b>\$1,619.95</b> with continuing monthly payments of <b>\$100</b>.</li> </ul>	
	<b>Letters</b> 051810		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>	<b>Distribution pursuant to Decedent's Will is to:</b>	
<input checked="" type="checkbox"/>	<b>FTB Notice</b>	<ul style="list-style-type: none"> <li><b>REBBA WORKMON</b> – [<b>\$138,899.59</b> cash] and <b>50% interest</b> in the Note secured by Deed of Trust on real property located at 15528 S. Hughes;</li> <li><b>CAROLYN E. KENDRICK</b> – [<b>\$138,899.59</b> cash] and <b>50% interest</b> in the Note secured by Deed of Trust on real property located at 15528 S. Hughes.</li> </ul>	

**(1) Petition for Settlement on Waiver of Account; (2) Petition for Final Distribution and for (3) Allowance of Compensation for Ordinary Services**

<b>DOD: 5/27/2010</b>	<b>MICHAEL W. McNIFF,</b> Administrator, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Accounting is waived.	<p><u>Note:</u> Attorney made a math error in the calculation of statutory attorney fees. The correct amount for statutory fees is \$5,957.50 and not \$6,957.50 as listed in the petition and the order. The attorney has agreed to accept \$4,000.00 as her fee for ordinary services, therefore distribution is not affected. Examiner has interlineated the order to reflect the correct amount of statutory fees.</p>
<b>Cont. from</b>		
<input type="checkbox"/> Aff.Sub.Wit.	I & A -	
<input checked="" type="checkbox"/> Verified	<b>\$160,000.00</b>	
<input checked="" type="checkbox"/> Inventory	POH - <b>\$ 61,002.88</b>	
<input checked="" type="checkbox"/> PTC	Administrator - <b>waives</b>	
<input checked="" type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Attorney - <b>\$4,000.00</b> (less than statutory)	
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.	<b>Distribution, pursuant to intestate succession, is to:</b>	
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	Michael W. McNiff - <b>\$19,000.96</b>	
<input checked="" type="checkbox"/> Letters 10/18/10	Mark McNiff - <b>\$19,000.96</b>	
<input type="checkbox"/> Duties/Supp	Richard McNiff - <b>\$19,000.96</b>	
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input checked="" type="checkbox"/> FTB Notice		
		<b>Reviewed by: KT</b>
		<b>Reviewed on: 2/22/12</b>
		<b>Updates:</b>
		<b>Recommendation: SUBMITTED</b>
		<b>File 5 - McNiff</b>



**Petitioner states, continued:**

- Pursuant to an ex parte petition and order of the Court, the Trustee paid several medical services creditors, including Golden Living Center care facility, for a total sum of **\$6,993.28**;
- There are 4 creditors that have not been paid, consisting of the Petitioner and persons related to the Petitioner; Petitioner seeks Court approval to pay the following claims totaling **\$29,106.15**:
  - **\$3,118.00** to **ERIC BROWN** [*relationship to the Decedent or Petitioner unstated*], for medical bills and lost wages due to injury sustained while working at the Beeler property getting it ready for sale; medical bill was **\$118.00**, and he was unable to work for 10 days at his job as a self-employed plumber making **\$600.00** per day, thus Mr. Brown claimed lost wages of **\$6,000.00** for 10 days work; Trustee agreed to settle the claim for **\$3,000.00** plus the medical expenses (*please refer to Exhibit 1 for copy of written request to Trustee and copy of urgent care medical evaluation and bill*);
  - **\$12,750.45** to **GAIL BROWN** (Trustee, niece) and **\$9,396.38** to **DONNA WYATT** [*relationship to the Decedent or Petitioner unstated*], for the care of Chester and Lorene for ~8 months by Donna, who understood that she was to be compensated for her work; and for the care of Lorene after Chester's death, as it is specifically stated in Chester's Will that Gail is to be paid and compensated for taking care of Lorene after Chester's death; Gail and Donna paid bills with their own funds and took care of the Beelers (*please refer to Exhibits 2 and 3 for summaries of their work and receipts for expenses*);
  - **\$3,841.32** to **LANCE ARMO**, Attorney for Donna Wyatt and Gail Brown in the initial probate proceedings and the will contest until Petitioner Gail Brown's current attorney substituted in; Petitioner paid Mr. Armo \$2,725.00 and Mr. Armo claims a balance due of \$1,116.32 (*please refer to Exhibit 4 for copies of his invoices*); Petitioner requests to be reimbursed the amount she has paid, and for approval to pay the balance due to Mr. Armo.
- After a *Notice of Proposed Action* was mailed to all interested parties on 11/5/2010, and no objections were received, the Trustee sold the real property at 6205 W. Dudley in Fresno for **\$190,000.00**, with escrow closing on 1/13/2011; proceeds from the sale deposited into the blocked estate account totaled **\$154,987.79**;
- The Trust is a beneficiary of the Probate Estate (Case 10CEPR00104) and should receive funds in excess of **\$100,000**; no funds have yet been received from the Probate Estate;
- Trustee will pay taxes that become due, and Trustee has paid expenses of Trust administration except for claims of Eric Brown, Gail Brown, Donna Wyatt, Lance Armo, and Trustees and attorney's fees;
- The Trust does not specify the Trustee's compensation; pursuant to Probate Code § 15681, the Trustee is entitled to reasonable compensation, which Petitioner believes to be **\$13,502.96** computed on a fee base of **\$525,148.04** for services similar to that performed by an executor of an estate;
- Petitioner's attorney has rendered services on behalf of the Trust administration and of the related probate petitions; services through 12/31/2011 and costs advanced (of \$557.62) total **\$19,032.93** (*please refer to Exhibit 6 for Declaration in Support of Request for Compensation for Attorney's Services, stating in part: on 8/3/2010 the parties attended a settlement conference with Judge Kazanjian at which it was agreed that Attorney Ruth Lind's fees would be paid out of the Probate Estate, and Attorneys Barrus & Roberts would be paid out of the Trust administration*).

*~Please see additional page~*

**Petitioner requests authorization to make the following preliminary distributions** from the remaining cash on hand of **\$245,697.08**, which will be available for distribution after payment of creditors, trustees compensation, attorney's fees, and closing reserve (as noted above). Petitioner states the pecuniary gifts set forth in Section 4.03(b) of the Trust total **\$300,000.00**, and the Trustee would like to distribute **\$240,000.00 or 80% of each bequest**, as follows:

1. ANNA B. HINNLEY – **\$32,000.00**
2. WEST PARK BAPTIST CHURCH – **\$80,000.00**
3. BETTY RODGERS – **\$32,000.00**
4. FRANCES ALVERS – **\$32,000.00**
5. GAIL BROWN – **\$32,000.00**
6. JOHN H. BEELER – **\$32,000.00**

**Petitioner states** it is anticipated the Trust will receive in excess of **\$100,000** from the Probate Estate, and the Trust is also receiving payments of **\$1,166.52** on the promissory note asset; if the Trust receives the **\$100,00**, the Trust will have sufficient funds to pay the balance of the pecuniary gifts; after there are sufficient cash funds to pay the balance of the pecuniary gifts, the estate residue will be paid to the Fresno Rescue Mission; the Trustee anticipates it will distribute the remaining cash and the promissory note to the Fresno Rescue Mission and close the estate.

**Petitioner prays for an Order:**

1. Settling, allowing and approving the First Account and Report of the Petitioner as Trustee;
2. Confirming and approving all acts of and proceedings of the Petitioner as trustee relating to the matters set forth in the account;
3. Authorizing and directing the Trustee to pay the following creditors:
  - Eric Brown - **\$3,118.00**
  - Gail Brown - **\$12,750.45**
  - Donna Wyatt - **\$9,396.38**
  - Lance Armo - **\$3,841.32** (\$2,725.00 reimbursed to Gail Brown and **\$1,116.32** to Lance Armo)
4. Authorizing and directing the Trustee to pay Attorneys Roberts & Barrus compensation and reimbursement of costs advanced through 12/31/2011 in the amount of **\$19,032.93**; and
5. Allowing Petitioner to make preliminary distribution of pecuniary bequests in the amount of **\$240,000.00**, as follows:
  - ANNA B. HINNLEY – **\$32,000.00**
  - WEST PARK BAPTIST CHURCH – **\$80,000.00**
  - BETTY RODGERS – **\$32,000.00**
  - FRANCES ALVERS – **\$32,000.00**
  - GAIL BROWN – **\$32,000.00**
  - JOHN H. BEELER – **\$32,000.00**
6. Authorizing and directing the Trustee to pay to Gary Bagdasarian **\$18,095.71** as compensation for services on behalf of the beneficiaries. (*Note: This request is not in Petitioner's original request for payment of attorney fees; please refer to Response of Gail Brown filed 2/22/2012 indicating she is willing to pay ½ of Mr. Bagdasarian's attorney fees, although they are significantly more than Petitioner expected.*)

*~Please see additional page~*

***Response and Objection to First Account of Trustee, Report of Trustee, Confirmation of Payment to Creditors and Allowance of Payment to Creditors, Fixing of Trustee's Compensation, and Approving Payment of Attorney's Fees and for Preliminary Distribution*** filed on 2/20/2012 by ANNA B. HINLEY and FRANCES ALBERS states:

- They are residents of the State of Maryland and are beneficiaries under Decedent's Will (Case 10CEPR00104) and of the Trust;
- As described by Petitioner Gail Brown, an agreement was reached by the parties participating in the settlement conference in the Probate matters that modify the distribution terms set forth in the Will and Trust; the agreement was a basis for allowing Pastor James Roberts to act as the Executor of the Estate;
- While the distribution terms under the agreement, which was never signed, have not been followed to date, the beneficiaries have agreed to allow the administration to progress through the preliminary distribution of the Probate estate and now of the Trust estate in order to move the administration of each matter along; however, as part of the agreement initially between the parties, the attorneys for the Executor were to be paid out of the Estate upon Court approval and attorneys for the Trustee were to be paid out of the Trust upon Court approval; the fees for the beneficiaries, Hinley and Albers, were to be paid equally from the Probate estate and the Trust estate;
- With that understanding, the *Declaration of Gary Bagdasarian in Support of Payment of Attorney's Fees on Behalf of Beneficiaries and Hinley and Albers* is attached, reflecting a total amount of **\$35,280.00** and costs of **\$455.71**;
- Request is made that all costs and ½ of the fees in the amount of **\$17,640.00** or a total of **\$18,095.71** be paid from the Trust.

***Response of Petitioner Gail Brown to Response and Objection Filed by Gary Bagdasarian to First Account of Trustee*** filed on 2/22/2012 states:

- Petitioner acknowledges that an agreement was reached for the administration of the related probate estate and trust administration and that as part of the agreement, it was agreed that the attorney's fees of Gary Bagdasarian would be paid ½ from the probate estate and ½ from the trust;
- **While the attorney's fees are significantly more than Petitioner expected, Petitioner is willing to abide by the agreement and is willing to pay ½ of Mr. Bagdasarian's fees.**

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

<b>Age:</b>		<b>NEEDS/PROBLEMS/COMMENTS:</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: skc</b>	
	<b>Reviewed on: 2-21-12</b>	
	<b>Updates:</b>	
	<b>Recommendation:</b>	
	<b>File 7 - Eaton</b>	

**OFF CALENDAR**

Inventory and Appraisal filed 2-9-12.

		<b>JAMES L. SACCHERI</b> is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>1. Proof of service of the <i>Notice of Hearing</i> indicates the <i>Notice of Hearing</i> was mailed on 2/9/12, 20 days notice and not 30 days as required by Probate Code §17203.</b>  <b>2. Order does not comply with Local Rule 7.6.1C.</b>
		Account period: 6/20/2002 – 7/1/2008	
<b>Cont. from 011812</b>		Accounting - \$419,906.61	
	<b>Aff.Sub.Wit.</b>	Beginning POH - \$299,293.44	
✓	<b>Verified</b>	Ending POH - \$ 53,417.09	
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>	<b>Petitioner prays that the accounting for the period of 6/20/2002 – 7/1/2008 be settled, allowed and approved.</b>	
✓	<b>Aff.Mail</b>	W/O	
	<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: 2/21/12</b>
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 8 – Marando</b>

## (1) First and Final Account and Report of Administrator and (2) Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and for (3) Distribution

<b>DOD: 10-11-10</b>	<b>PUBLIC ADMINISTRATOR</b> , Executor with Full IAEA without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Account period: 5-4-11 through 12-28-11	1. The Decedent's will appoints the Public Administrator as Executor without bond. However, the Public Administrator requests payment of a bond fee of \$1,382.48 pursuant to Probate Code §7621(d).
✓ Verified	Accounting: \$829,675.23	The Court may require clarification regarding the applicability of this section when specifically nominated without bond pursuant to will.
✓ Inventory	Beginning POH: \$782,675.23	<i>Note: Public Administrator's Response filed 2-27-12 states that this is a very rare circumstance that the Public Administrator is nominated by the Decedent and the Public Administrator has no objection to removing the bond fee.</i>
✓ PTC	Ending POH: \$799,225.85 (cash)	<i>If the Court agrees, a revised order will be prepared.</i>
✓ Not.Cred.	Executor (Statutory): \$19,428.41	2. The Decedent's will specifically devises his estate as follows: "...to the County of Fresno, a Political Subdivision of the State of California. It is my wish and desire that the property distributed to said County of Fresno be used by its Parks and Recreation Division. In the use of said estate, it is my further wish and desire that reasonable and appropriate recognition be given to the memory of my father, Floyd Lawrence and my mother, Mildred Lawrence, and to my memory."
✓ Notice of Hrg	Executor (Extraordinary): \$248.00 (1 Deputy hour @ \$96.00/hr and 2 Staff hours @ \$76.00/hr for preparation of tax returns)	The proposed order simply distributes the funds to "John A. Navarette, County Administrative Officer." The Court may require the order to contain more specific language.
✓ Aff.Mail	Attorney (Statutory): \$19,428.41	<i>Note: Public Administrator's Response filed 2-27-12 states the only entity legally capable of accepting gifts to the County is the Board of Supervisors by way of the County Administrative Officer. The Dept. of Parks and Recreation has already appeared before the Board of Supervisors regarding this matter and the Board has made statements that the funds will be used to maintain parks. In addition, the Department has already provided a rendering of the plaque that will be used to memorialize Mr. Lawrence and his parents.</i>
Aff.Pub.	Bond fee: \$1,382.48	
Sp.Ntc.	Closing: \$5,000.00	
Pers.Serv.	Costs: \$836.50 (Filing fee, etc.)	
Conf. Screen	<b>Distribution pursuant to Decedent's will:</b>	
✓ Letters	County of Fresno: \$752,902.05	
Duties/Supp	County of Fresno: \$754,284.53	
Objections		
Video Receipt		
CI Report		
✓ 9202		
✓ Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 2-21-12
UCCJEA		Updates: 2-27-12
Citation		Recommendation:
✓ FTB Notice		File 9 - Lawrence

**Amended Petition for Probate of Will and for Letters of Administration with Will Annexed;  
 Authorization to Administer Under IAEA (Prob. C. 8002, 10450)**

<b>DOD: 9-27-11</b>	<b>JIMMIE DALE REIS</b> , Son, is Petitioner and requests appointment as Administrator with Full IAEA without bond.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Note:</u> Petitioner originally requested to admit Decedent's will dated 12-10-77 to probate; however, this amended petition indicates that Decedent died intestate.  <i>Examiner notes that the will devises the entire estate to Decedent's five children, which is the same as intestate succession. Petitioner's siblings consent to his appointment and waive bond.</i>
	All heirs waive bond	
<input type="checkbox"/> Aff.Sub.Wit.	Full IAEA – ok	
<input checked="" type="checkbox"/> Verified	Decedent died intestate	
<input type="checkbox"/> Inventory	Residence: Laton, Fresno County, CA	
<input type="checkbox"/> PTC	Publication: Fresno Business Journal	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	<b>Estimated Value of Estate:</b>	
<input checked="" type="checkbox"/> Aff.Mail	Personal property: \$ 55,000.000	
<input checked="" type="checkbox"/> Aff.Pub.	Annual income: \$ 7,600.00	
<input type="checkbox"/> Sp.Ntc.	Real property: \$ 200,000.00	
<input type="checkbox"/> Pers.Serv.	<b>Total: \$ 262,600.00</b>	
<input type="checkbox"/> Conf. Screen	Probate Referee: Rick Smith	
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		

<b>Reviewed by:</b> skc
<b>Reviewed on:</b> 2-22-12
<b>Updates:</b> 2-23-12, 2-27-12
<b>Recommendation:</b>
<b>File 10 - Reis</b>



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

<b>DOD: 9-23-11</b>	<b>SHAWNA ROBBINS, LA RON ALIPAZ</b> , daughters, <b>and ROBBIE ROBBINS</b> , son, are Petitioners.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	40 days since DOD	
	No other proceedings	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>	I&A: \$70,000.00	
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>	Decedent died intestate	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	W Petitioners request court determination that Decedent's 100% interest in certain real property located in Fresno passes to them in equal undivided one-third interests pursuant to intestate succession.	
<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 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 on: 2-22-12</b>
		<b>Updates:</b>
		<b>Recommendation: SUBMITTED</b>
		<b>File 12 - Nelson</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.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>1. Petitioner requests the court order the Trustee to turn over relevant information on the administration of the trust. Under Probate Code 16061 the Trustee has a duty to report said information regarding the administration of the trust to a beneficiary, relevant to the beneficiary's interest. There has been no determination at this point that Petitioner is a beneficiary of the trust only that she is an heir of the Trustor.</b>  <b>2. Need Order.</b>
		<b>Petitioner states</b> she is an heir at law, and believes she is a beneficiary of the Betty Ruth Cozby Trust.	
<b>Cont. from</b>		Betty Ruth Cozby died in April 2011.	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>	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.	
<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>	Petitioner believes Betty Cozby's friend, Edward D. Reimer, is the named successor Trustee of the Betty Ruth Cozby Trust.	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W/	
<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>	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.	
<input type="checkbox"/>	<b>CI Report</b>	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.	
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>	X	
<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>Wherefore, Petitioner seeks relief as follows:</b>	
		<ol style="list-style-type: none"> <li>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>For an Order compelling turnover of relevant information on the administration of assets of the Trust pursuant to Probate Code section 16061;</li> <li>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>Reviewed by: KT</b>	
		<b>Reviewed on: 2/22/12</b>	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 13 - Cozby</b>	

Petition for Final Distribution on Waiver of Accounting and for Allowance of Statutory Commissions (Prob. C. 10400-10406, 10904, 11600, 11642)

<b>DOD: 8/7/2010</b>		<b>PATRICK McLEMORE</b> , son and Administrator, is Petitioner.		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		Accounting is waived.		<u>Continued from 1/24/2012. Minute Order states the matter is continued to 2/29/2012 at the request of the Petitioner.</u>	
Cont. from 012412		I & A - <b>\$145,000.00</b>		<u>The following issues from the last hearing remain:</u>	
	Aff.Sub.Wit.	POH - <b>\$14,029.20</b> (all cash)		1. Need proof of mailed service of 15 days' notice prior to hearing of the <i>Notice of Hearing</i> along with a copy of the <i>Petition</i> for Union Bank per the <i>Request for Special Notice</i> filed 1/25/2011, pursuant to Probate Code §§ 1250, 1252, 11000, and 11601.	
✓	Verified	Administrator - <b>[\$5,260.00]</b> (statutory)		2. Need proof of mailed service of 15 days' notice prior to hearing of the <i>Notice of Hearing</i> along with a copy of the <i>Petition</i> for Scott Weltman, Esq. (for Bank of America) per the <i>Request for Special Notice</i> filed 9/16/2010, pursuant to Probate Code §§ 1250, 1252, 11000, and 11601.	
✓	Inventory			3. Statutory fee base does not include the \$3,000.00 loss on sale of Decedent's automobile, and loss on sale of real property as required by Probate Code § 10800. Need revised proposed order awarding the correct amount of statutory compensation to the Petitioner as Administrator, and distributing the property pursuant to the <i>Amendment to the Petition for Final Distribution on Waiver of Accounting</i> filed on 2/17/2012.	
✓	PTC				
✓	Not.Cred.				
	Notice of Hrg				
✓	Aff.Mail	W			
	Aff.Pub.	/			
	Sp.Ntc.				
	Pers.Serv.				
	Conf. Screen				
	Letters	101310			
<b>Duties/S</b>					
<b>Objections</b>					
<b>Video Receipt</b>					
<b>CI Report</b>					
✓	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
	UCCJEA				
	Citation				
✓	FTB Notice				
				Reviewed by: LEG	
				Reviewed on: 2/17/12	
				Updates: 2/24/12	
				Recommendation:	
				File 14 - McLemore	

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

Age: 7 months DOB: 07/27/11	<p align="center"><b><u>NO TEMPORARY REQUESTED</u></b></p> <p><b>VIOLETA ALCANTAR</b>, maternal grandmother, is Petitioner.</p> <p>Father: <b>CHRISTIAN LOPEZ</b></p> <p>Mother: <b>FLOR VIOLETA SERRATOS</b> – <i>consent and waiver of notice filed 02/01/12</i></p> <p>Paternal grandfather: <b>JOE LOPEZ</b> – <i>served by mail 01/27/12</i></p> <p>Paternal grandmother: <b>TERESA LOPEZ</b> – <i>served by mail 01/27/12</i></p> <p>Maternal grandfather: <b>RIGOBERTO SERRATOS</b> – <i>served by mail 01/27/12</i></p> <p>Petitioner states that the mother is only 16 and is not exhibiting the maturity necessary to properly care for her son. Petitioner states that she has been the primary care provider and has supported the baby since birth. Petitioner states that the mother has threatened to run away and take the baby with her. Petitioner states that the father is 18 and currently on probation for burglary. Father has a history of substance abuse and arrest and is not able to properly care for the child.</p> <p><b>Court Investigator Julie Negrete's report was filed 02/14/12.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need proof of personal service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> Consent and Waiver of Notice <u>or</u> Declaration of Due Diligence for:          - Christian Lopez (father)</p>
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.    x		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		<p>Reviewed by: JF</p> <p>Reviewed on: 02/22/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 15 - Lopez</p>

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

Age: 4 DOB: 08/23/07	<b><u>TEMPORARY EXPIRES 02/29/12</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>KIMBERLY CARMICKLE and DENNIS CARMICKLE</b> , paternal grandmother and step-grandfather, are Petitioners.	<b>1. Petition is missing Child Information Attachment (Form GC-21(CA)).</b>
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.	Father: <b>KEVIN ROSS WOOLF</b> – <i>consent and waiver of notice filed 12/28/11</i>	
<input checked="" type="checkbox"/> Verified	Mother: <b>SERENA M. WOOLF</b> – <i>consent and waiver of notice filed 12/28/11</i>	
<input type="checkbox"/> Inventory	Paternal grandfather: <b>GARY S. WOOLF</b> – <i>declaration of due diligence filed 12/28/11</i>	
<input type="checkbox"/> PTC	Maternal grandfather: <b>RALPH J. CALDERON</b> – <i>consent and waiver of notice filed 12/28/11</i>	
<input type="checkbox"/> Not.Cred.	Maternal grandmother: <b>GLORIA FLORES</b> – <i>consent and waiver of notice filed 12/28/11</i>	
<input checked="" type="checkbox"/> Notice of Hrg	Petitioners state that the child has resided with them since birth and they have played an active role with their grandson.	
<input checked="" type="checkbox"/> Aff.Mail w/	<b>Court Investigator Jennifer Young's report was filed 02/22/12.</b>	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv. n/a		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		<b>Reviewed by: JF</b>
		<b>Reviewed on: 02/22/12</b>
		<b>Updates: 02/23/12</b>
		<b>Recommendation:</b>
		<b>File 16A - Woolf</b>

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

Izaiah age: 3 years DOB: 8/24/2008	<b>TEMPORARY EXPIRES ON 2/29/12</b>  <b>TRACY THOMAS</b> , maternal grandmother, is Petitioner.  Father: <b>C.J. BRYANT</b> – <i>declaration of due diligence filed 01/10/12</i>  Mother: <b>GINA McADAMS</b> – <i>declaration of due diligence filed 01/10/12</i>  Paternal grandparents: Unknown  Maternal grandfather: Not listed  <b>Petitioner states</b> that both of the children have lived with her since birth with their parents in and out of their lives. Petitioner states that she wants to provide a safe and stable home for the children.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  Minute Order from the hearing on the temporary petition dated 1/11/12 states the mother and father are to be given notice for the hearing on the general petition.  1. Need <i>Notice of Hearing</i> .  2. Need proof of personal service of the <i>Notice of Hearing</i> along with a copy of the Petition or <i>Consent and Waiver of Notice</i> on: a. C. J. Bryant (father) b. Gina McAdams (mother)  3. Need proof of service of the <i>Notice of Hearing</i> along with a copy of the Petition or <i>Consent and Waiver of Notice</i> or <i>Declaration of Due Diligence</i> on: a. Paternal grandparents b. Maternal grandfather  Court Investigator Samantha Henson to provide:  1. Court Investigator’s Report 2. Clearances
Adrian age: 2 years DOB: 10/4/2009		
Cont. from		
Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	X	
Aff.Mail	X	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	X	
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
Objections		
Video Receipt		
CI Report	X	
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 2/22/12
		Updates:
		Recommendation:
		File 17 - Bryant

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

Age: 49	NO TEMPORARY REQUESTED	<b>NEEDS/PROBLEMS/COMMENTS:</b> 1. Need Notice of Hearing. 2. Need proof of service of Notice of Hearing with a copy of the Petition on all relatives at least 15 days prior to the hearing per Probate Code §1822 and Cal. Rule of Court 7.51. <u>Note:</u> The petition does not list any relatives; however, the Court Investigator’s report mentions that the proposed conservatee has children, siblings, and possibly parents (the children stay with their grandparents). <u>Note:</u> See Cal. Rule of Court 7.51 regarding direct notice to minors with copy to adult with whom they reside. 3. Need Citation. 4. Need proof of personal service of Citation with a copy of the Petition at least 15 days prior to the hearing per Probate Code §1824 on the proposed conservatee Perla A. Cariaga. 5. Need video receipt pursuant to Local Rule 7.15.8. 6. Need clarification as to the nature and value of the assets for bonding purposes pursuant to Probate Code §2320(c)(4) and Cal. Rule of Court 7.207.
DOB: 4-18-62	JOEL D. CARIAGA, Spouse, is Petitioner and requests appointment as conservator of the person with medical consent powers and as conservator of the estate.	
Aff.Sub.Wit.		
✓ Verified	Voting rights affected	
Inventory		
PTC	A Capacity Declaration was filed 1-20-12.	
Not.Cred.		
Notice of Hrg	Estimated Value of Estate: <i>Not provided</i>	
Aff.Mail	Petitioner does not state a reason for the conservatorship in the Petition. (#5.c.(1) is blank and there is no attachment.)	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	Court Investigator Julie Negrete filed a report on 2-16-12.	
✓ 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: 2-22-12		
Updates:		
Recommendation:		
File 18 - Cariaga		



Atty Davis, Deborah (pro per – maternal great-aunt/Petitioner)

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

Richard, 3 DOB: 11/14/08	<p align="center"><b><u>GENERAL HEARING 04/17/12</u></b></p> <p><b>DEBORAH DAVIS</b>, maternal great-aunt, is Petitioner.</p> <p>Father: <b>UNKNOWN</b></p> <p>Mother: <b>CASSANDRA ROBLES</b> – <i>consent and waiver of notice filed 02/14/12</i></p> <p>Paternal grandparents: UNKNOWN</p> <p>Maternal grandfather: PETE ROBLES Maternal grandmother: TRACEY BEHN</p> <p>Petitioner states that the mother is suffering from serious health conditions that are limiting her ability to walk and take care of herself. A family friend who had been assisting the mother left and the mother is not able to care for them herself. Petitioner states that the children moved in with her on 02/06/12. Mother is in agreement with the guardianship due to her medical problems.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need <i>Notice of Hearing</i>.</li> <li>2. 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>Temporary Guardianship Petition</i> <u>or</u> Consent and Waiver of Notice <u>or</u> Declaration of Due Diligence for: - Father (unknown)</li> </ol>	
Terrance, 3 DOB: 11/14/08			
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			
✓ Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
		Reviewed by: JF	
		Reviewed on: 02/22/12	
		Updates:	
		Recommendation:	
		File 20 - Reyes	

Atty Garcia, Elsa (pro per – paternal aunt/Petitioner for Alfredo/Alyssa)

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

Alfredo, 5 DOB: 08/24/06	<p align="center"><b><u>GENERAL HEARING 04/11/12</u></b></p> <p><b>ELSA GARCIA</b>, paternal aunt, is Petitioner.</p> <p>Father: <b>JOSE AGUSTIN LEON</b> – <i>incarcerated</i></p> <p>Mother: <b>ROSEANA ORTIZ</b> – <i>personally served 02/17/12</i></p> <p>Paternal grandfather: AGUSTIN LEON Paternal grandmother: PETRA GARCIA AUMADA</p> <p>Maternal grandfather: DECEASED Maternal grandmother: IRENE ORONA – <i>served by mail on 02/21/12</i></p> <p>Siblings: AGUSTIN LEON, JAYLEN ORTIZ</p> <p>Petitioner states that both parents are incarcerated. The children had been living with their mother prior to her being arrested. The mother’s home was very dirty, with no gas and no food in the refrigerator. The mother was evicted from her home for not paying the rent.</p> <p>Declaration of Elsa Garcia, Petitioner, filed 02/23/12 states that Alyssa and Alfredo were picked up from school early by their mother and it is believed that they are living with their maternal grandmother. Petitioner states that the maternal grandmother is in poor health and does not have a home for the children, she currently is staying with her son. Petitioner states that since the children were picked up by the maternal grandmother, they have been hiding and the Petitioner is unable to locate them, but she believes that the children are attending school. Petitioner states that she continues to want what is best for the children and can provide a safe and stable home for them.</p>	NEEDS/PROBLEMS/COMMENTS:	
Alyssa, 9 DOB: 02/11/03		<p>This Petition pertains to Alfredo and Alyssa Ortiz only. A Petition guardianship of Jaylen and Agustin by another paternal aunt, Guadalupe Villagomez was heard on 02/27/12.</p> <ol style="list-style-type: none"> <li>1. UCCJEA is incomplete. Need children’s residence address from birth to 02/03/12.</li> <li>2. Need <i>Notice of Hearing</i>.</li> <li>3. 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: - Jose Agustin Leon (father)</li> </ol>	
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			
✓ Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
		Reviewed by: JF	
		Reviewed on: 02/17/12	
		Updates: 02/27/12	
		Recommendation:	
		File 21 – Ortiz & Leon	

Petition for Appointment of Temporary Conservatorship of the Person and Estate

Age: 74 DOB: 07/17/37	<b><u>TEMPORARY GRANTED EX PARTE;</u></b> <b><u>EXPIRES 02/29/12</u></b>  <b><u>GENERAL HEARING 03/29/12</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Bond should be set at \$123,701.60 to include the cost of recovery.  5. Need CI report and advisement of rights (CI to provide).	
<b>Cont. from</b>	<p><b>HUBERT MITCHELL</b>, brother, and <b>KATE SINGH</b>, niece, are Petitioners and request appointment as Temporary Conservator of the Person with medical consent powers; and request that <b>BRUCE BICKEL</b> be appointed as Temporary Conservator of the Estate with bond set at \$113,000.00 with the powers under Probate Code § 2591 to (1) let or lease property of the estate, (2) to sell real property of the estate, and (3) the power to negotiate and execute a settlement, extension or modification of mortgages encumbering real property of the estate.</p> <p><b>Estimated Value of the Estate:</b>          Personal property - \$15,000.00          Annual income - 97,456.00  <b>Total - \$112,456.00</b></p> <p>Petitioner states that temporary conservatorship of the person and estate is necessary because Mr. Mitchell suffers from dementia and psychosis due to medical condition and is unable to care for his personal needs. Mr. Mitchell has wandered from his home in Los Angeles and the Los Angeles Police Department stated that he is no longer able to remain in his home unsupervised. Petitioners have made arrangements and moved Mr. Mitchell to the Fresno area. A temporary conservatorship of the estate is needed because Mr. Mitchell owns real property in Los Angeles and Kern County, some of which is tenant occupied and some of which is encumbered by mortgages that are going into foreclosure. A temporary conservatorship is necessary to ensure that Mr. Mitchell is living in a safe environment and that his health care needs are met and that his financial affairs are managed in order to prevent loss to the estate.</p> <p><b>Court Investigator Jennifer Young's report was filed – NEED REPORT.</b></p>		
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail			
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input checked="" type="checkbox"/> Pers.Serv.			
<input checked="" type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters X			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report X			
<input type="checkbox"/> 9202			
<input type="checkbox"/> Order X			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
		<b>Reviewed by:</b> JF <b>Reviewed on:</b> 02/23/12 <b>Updates:</b> 02/27/12 <b>Recommendation:</b> File 22 - Mitchell	