

Petition to Close Estate and Request for Discharge

DOD: 12/3/2005		<p>PUBLIC ADMINISTRATOR, successor Administrator, is petitioner.</p> <p>Petitioner states from documents in the file, it appears that the cash assets of the estate are gone. Paid out to the estranged wife on a 13100 Affidavit in 2006. The household furniture and furnishings were taken from the decedent's residence by his girlfriend and put into a storage unit in her name, the subsequently disposed of or sold. They were never turned over to the daughter administering the estate. Ten years have passed since the decedent's death.</p> <p>The Public Administrator's investigator has revealed that there are no assets to administer, and not funds available to use to seek return of possibly misappropriated assets.</p> <p>Because there are no assets to administer or recover, the Public Administrator respectfully requests that this estate be closed and she be discharged as successor Administrator.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need proof of service of the Notice of Hearing on: <ol style="list-style-type: none"> a. Antonio Silvas (beneficiary) b. Frances Silvas (beneficiary) 2. Need proof of service of the Notice of Hearing along with a copy of the Petition on the Franchise Tax Board, pursuant to the Request for Special Notice filed on 4/25/08. 	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			X
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p>Reviewed by: KT</p> <p>Reviewed on: 3/2/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1- Silvas</p>		

Petitioner Harrington, Amber A. (Pro Per – Mother – Petitioner)

Guardian Harrington, Thomas R. (Pro Per – Maternal Grandfather – Guardian)

Petition - Terminate Petition for Termination of Guardianship

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			X
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 3/2/16	
			Updates: 3/3/16	
			Recommendation:	
			File 2- Harrington	

4 Lina Lynn Longboy and Elisa Monique Garcia (GUARD/P)

Case No. 11CEPR00786

Guardian Gonzalez, Josephina (Pro Per – Guardian – Petitioner)

Petition for Termination of Guardianship (Lina only)

		See petition for details.	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Note: This petition pertains to the minor Lina Lynn Longboy only.</p> <ol style="list-style-type: none"> The proof of service on the Notice of Hearing is blank as to the server's information. The Court may require clarification. The Court may require notice to the paternal grandparents and maternal grandfather pursuant to Probate Code §1460(b)(5). 	
	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: skc	
			Reviewed on: 3/2/16	
			Updates:	
			Recommendation:	
			File 4- Longboy & Garcia	

Probate Status Hearing RE: Filing of the Petition for Final Distribution by the Public Administrator

DOD: 1/28/13	<p>History: LUPE GALINDO, Niece and Former Executor, filed her Amended First and Final Account on 6/8/15; however, due to the existence of a certain creditor's claim, the estate did not appear to be in a condition to close.</p> <p>At hearing on 3/4/15, Ms. Galindo was removed as Executor and the Public Administrator was appointed as the Personal Representative of the Estate.</p> <p>At hearing on 11/10/15, Ms. Galindo's petition was denied, and the Court set this status hearing for the filing of the petition for final distribution by the Public Administrator.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need petition for final distribution or written status report per Local Rule 7.5.</p>
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Aff.Sub.Wit.		
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Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>Reviewed by: skc</p> <p>Reviewed on: 3/2/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 6- Samora</p>	

Attorney: Heather H. Kruthers (for Administrator/Public Administrator)

Probate Status Re: Filing of the First Account and/or Petition for Final Distribution

DOD: 3/28/13	<p>PUBLIC ADMINISTRATOR was appointed as the Administrator of the estate on 8/19/13.</p> <p>Background: Decedent's father, Hugo Noroyan and Decedent's mother, Patricia English each filed competing Petitions for Probate. On 8/19/13 the Court on its own motion appointed the Public Administrator as personal representative of the estate.</p> <p>On 1/23/14 Ian Michinson's filed a Petition for Probate of Decedent's purported Will.</p> <p>Patricia English filed a Contest to the Purported Will.</p> <p>A trial was began on 4/7/15 before Judge Arlan L. Harrell.</p> <p>Judge Arlan L. Harrell Statement of Decision, Judgment and Order was entered on 8/4/15. Judge Arlan L. Harrell ruled that the document proffered by Mitchinson not be admitted to probate. Letters of Administration having been previously issued to the Fresno County Public Administrator, unless a valid will is offered and admitted to probate, this matter shall follow the normal course of administration for an intestate estate.</p> <p>Notice of Status Hearing was mailed to the County Counsel Heather Kruthers on 8/13/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: A Petition to Determine Entitlement to the Estate has been filed by mother, Patricia English. The hearing set for 3/10/16.</p> <p>1. Need First Account, Petition for Final Distribution.</p>
Conf. from 100515, 120815		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
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Notice of Hrg		
Aff.Mail		
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Sp.Ntc.		
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Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>Reviewed by: KT</p> <p>Reviewed on: 3/2/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7 – Noroyan</p>	

Probate Status Hearing RE: First Acct and Final Dist

DOD: 6/15/14	<p>ABIGAIL SERRATO, Daughter, was appointed Executor with Full IAEA without bond on 12/9/14. Letters issued on 12/10/14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 2/9/16: Mr. Criego represents that the unsigned petition dropped off at the clerk's desk yesterday was a courtesy copy of a proposed accounting, but the distribution amounts will be changing. No appearance is necessary on 3/8/16 if the petition is filed at least two court days prior.</p> <p>As of 3/2/16, nothing further has been filed.</p> <p>1. Need first account or petition for final distribution pursuant to Probate Code §12200 or written status report pursuant to Local Rule 7.5.</p>
	<p>At the hearing on 12/9/14, the Court set this status hearing for the filing of the first account or petition for final distribution.</p>	
Cont. from 020916		
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: skc
		Reviewed on: 3/2/16
		Updates:
		Recommendation:
		File 8A- Serrato

**Ex Parte Request for Order Depositing Proceeds into a Blocked Account; and
Request for Partial Distribution**

DOD: 6/15/14	ABIGAIL SERRATO , Daughter, was appointed Executor with Full IAEA without bond on 12/9/14. Letters issued on 12/10/14.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 2/9/16</p> <ol style="list-style-type: none"> This petition was made as an ex parte motion; however, because it requires noticed hearing, the Court may require payment of the regular \$435.00 filing fee. The petition is not verified by the Executor pursuant to Probate Code §1020. Need Notice of Hearing and proof of service of Notice of Hearing on all interested parties and their attorney(s). Petitioner makes no allegations as to whether distribution may be made without loss to creditors or injury to the estate pursuant to Probate Code §11621. For example, has notice been given to the appropriate agencies as required by Probate Code §9202? Petitioner also makes no statement as to why preliminary distribution is necessary at this time, when the first account or petition for final distribution is now due pursuant to Probate Code §12200. Is the estate not in a condition to close? Why or why not? <p style="text-align: center;">SEE PAGE 2</p> <p>Reviewed by: skc</p> <p>Reviewed on: 3/2/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 8B-Serrato</p>
Cont. from 020916	I&A filed 6/11/15 reflects a total estate value of \$400,000.00 consisting of insurance proceeds (cash) of \$100,000.00 plus real property in Madera valued at \$300,000.00.	
Aff.Sub.Wit.		
Verified	X	
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	<p>On 12/24/15, Attorney Criego filed this Ex Parte Request for Order Depositing Proceeds into Blocked Account; and Request for Partial Distribution.</p> <p>The Court's order of 1/5/16 set the matter for noticed hearing on 2/9/15, which is the same date as the status hearing for the filing of the first account or petition for final distribution, which was set at appointment on 12/9/14. The order was mailed to Mr. Criego on 12/7/15.</p> <p>Mr. Criego's Ex Parte Petition (not verified by Ms. Serrato) states: Mr. Criego requests an ex parte order allowing the executor deposit a check in the sum of \$119,769.31, which was secured by the attorney on behalf of the estate from Transamerica Life Insurance Company, into a blocked account at Bank of the West.</p> <p>There is a partial dispute as to the distribution remains as to the proceeds; however, all parties have agreed and consented to a partial distribution to the non-disputed amount of \$48,000.00 as set forth below:</p> <ol style="list-style-type: none"> Payment to Rick Smith, Probate Referee, in the amount of \$320.00 Reimbursement for publication to attorney Criego in the amount of \$480.00 Reimbursement for filing fees to Attorney Criego in the amount of \$435.00 Partial distribution to the heirs as follows: <ul style="list-style-type: none"> - Genaro Serrato, Jr.: \$12,000.00 - David Serrato: \$12,000.00 - Javier Serrato: \$12,000.00 - Abigail Serrato: \$12,000.00 <p style="text-align: center;">SEE PAGE 2</p>	
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Attached to the petition is a letter dated 12/9/15 from Mr. Criego to all interested parties. Mr. Criego states he is in possession of the final insurance proceeds issued on behalf of the decedent.

Because there is no agreement between the heirs, he proposes to deposit the proceeds into a blocked account, pay the obligation relating to the Probate Referee, filing and publication fees, and request preliminary distribution of \$50,000.

The letter also states: "Additionally, that the legal description/address to the **MADERA** property be corrected and that the Executor be authorized to prepare a corrected deed **and each heir received a divisible interest in the property**" (emphasis in original); "That the Executor be authorized to correct the APN and legal description as to the unrecorded **FRESNO** property."

Attached to the letter are Consents to Notice of Proposed Action signed by all four heirs.

NEEDS/PROBLEMS/COMMENTS (Cont'd):

- 6. The above-referenced letter appears to imply that the executor may have or may be planning to distribute the estate real property to the heirs prior to Court authorization. Need clarification.**

Also note: If there are changes to the legal description as provided in the Inventory and Appraisal, this should be explained in the petition for final distribution.

- 7. The Final I&A filed 6/11/15 includes the insurance proceeds and real property in Madera. The above-referenced letter also indicates additional real property in Fresno that is not inventoried in this estate. The Court may require clarification.**

9 Jayden Freitas & Beau Freitas (GUARD/P)

Case No. 14CEPR01031

Petitioner Freitas, Amanda Jean (Pro Per – Mother)
Objectors Azevedo, Codie (Pro Per – Co-Guardian)
Objector Azevedo, Nicholas (Pro Per – Co-Guardian)
Petition for Visitation

Jayden, 13	<p>AMANDA JEAN FREITAS, Mother, is Petitioner.</p> <p style="text-align: center;"><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 01/26/2016: Matter is continued due to lack of service to the Guardians.</p> <p>The following issues remain:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing on Guardians Codie and Nicholas Azevedo. 	
Beau, 8			
Cont. from 120115, 012616			
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	n/a		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: LV	
		Reviewed on: 03/03/2016	
		Updates:	
		Recommendation:	
		File 9 – Freitas	

Petitioner Arreola , Sergio Robert (Pro Per – Non-Relative – Petitioner)

Objector Vargas, Joey (Pro Per – Mother – Objector)

Petition for Appointment of Temporary Guardian of the Person

		See petition for details	NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 2. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) on: - Joseph Munoz (Father) - Elizabeth Sage (Mother) - Joey Vargas (Mother)	
	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: skc	
			Reviewed on: 3/2/16	
			Updates:	
			Recommendation:	
			File 10- Vargas-Sage	

Petitioner Onyegebu, Ikemefuna (pro per – Maternal uncle)

Petitioner Marquez, Lisa Lee (pro per – maternal aunt)

Petition for Appointment of Guardian of the Person

		<p>TEMPORARY EXPIRES 01/26/16; extended to 3/8/2016</p> <p>IKEMEFUNA ONYEGEBU and LISA LEE MARQUEZ, Maternal Uncle and Aunt, are Petitioners.</p> <p>~Please see petition for details~</p> <p>Letters of Recommendation/in Support of Petitioner filed 10/02/15.</p> <p>Objection to Guardianship filed by Lenetta Thomas, mother, on 11/17/2015 and 12/1/2015.</p> <p>Court Investigator filed a report on 11/24/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Deshawn Deloach turned 18 on 01/20/16, therefore this Petition for guardianship no longer applies to him.</p> <p>Continued from 1/26/2016. Minute Order states Petitioner states that he has had difficulties addressing the defects with the paperwork due to a death in his family and his car being broken into on Christmas Eve. The Court admonishes that this will be the last continuance, and if the defects are not cured, the Court will consider terminating the temporary orders. The Court orders that the current visitation orders remain in full force and effect.</p> <p>Minute Order dated 12/1/2015 states the Court orders supervised visits with the mother every other Saturday from 11am to 1pm at the McDonald's on Chestnut and McKinley.</p> <p>The following defects from the last hearing remain:</p> <ol style="list-style-type: none"> 1. Need proof of 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> or <i>Consent & Waiver of Notice</i> or <i>Declaration of Due Diligence</i> for: <ol style="list-style-type: none"> a. Deshawn DeLoach, father, if Court does not find due diligence per Declaration filed 9/28/15. b. Deshawn and Deyviana's paternal grandfather; c. Brenda Anderson, maternal grandmother.
Cont. from 120115, 012616			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W /	
	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		
			<p>Reviewed by: JF / LEG</p> <p>Reviewed on: 3/2/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11 – Deloach/Vasquez</p>

12 The Thomas J. Zumwalt and Mary Diane Zumwalt Revocable Family Trust
Dated October 26, 2001 **Case No. 15CEPR01175**
Attorney: Gary G. Bagdasarian (for Petitioner Mary Diane Zumwalt)

Petition to Terminate Trust

	MARY DIANE ZUMWALT , sole Trustee of the Thomas J. Zumwalt and Mary Diane Zumwalt Revocable Family Trust, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Continued from 2/2/16. Minute order states Counsel requests a continuance to address the examiner's notes. <i>Please see additional page for Declaration of Gary Bagdasarian filed on 3/4/16</i>
Cont. from 011916, 020216	Petitioner states THOMAS J. ZUMWALT and MARY DIANE ZUMWALT, husband and wife, entered into that certain Thomas J. Zumwalt and Mary Diane Zumwalt Revocable Family Trust dated October 26, 2001.	Please see additional page for Needs/Problems/Comments.
<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	Thomas J. Zumwalt died on 8/6/15. Thereinafter Mary Diane Zumwalt became the sole Trustee.	
<input checked="" type="checkbox"/> Aff.Mail	W/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	Section 303 of the Trust provides that "The Trustee shall hold, administer and distribute all Trust assets for the benefit of the surviving spouse, both as to income and principal unless otherwise herein provided." Consequently, no Irrevocable Trust was directed to be created and the Trust remained Revocable as reflected in its name.	
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections	The Trust provides that upon the death of the surviving Trustor, Petitioner herein, the Trust shall terminate and the assets divide in four equal shares to the following beneficiaries: Thomas Zumwalt, Timothy Zumwalt, Robert Zumwalt and Daniel H. Zumwalt.	
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting	Although the Trust does not provide specifically that the surviving spouse, Petitioner herein, Mary Zumwalt, retains the power to revoke, the title of the Trust is the Revocable Family Trust and there is no specific language requiring the creation of an Irrevocable Trust.	
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
	Please see additional page	Reviewed by: KT
		Reviewed on: 3/2/16
		Updates: 3/7/16
		Recommendation:
		File 12- Zumwalt

**12 The Thomas J. Zumwalt and Mary Diane Zumwalt Revocable Family Trust
Dated October 26, 2001 Case No. 15CEPR01175**

Wherefore, Mary Diane Zumwalt, prays for a Court Order as follows:

1. The Thomas J. Zumwalt and Mary Diane Zumwalt Revocable Family Trust dated October 26, 2001 is terminated in its entirety;
2. All assets of the Thomas J. Zumwalt and Mary Diane Zumwalt Revocable Family Trust dated October 26, 2001 be distributed to Mary Diane Zumwalt.

Declaration of Gary Bagdasarian filed on 1/28/16 states all of the assets of the Trust were the community property of the Settlor, Thomas J. Zumwalt and Mary Diane Zumwalt.

All of the assets were community property, pursuant to Family Code §761 Mary Diane Zumwalt, the sole surviving settlor, acting alone, has the power to revoke the Trust as to community property.

NEEDS/PROBLEMS/COMMENTS:

1. Probate Code §15401(b)(1) states "Unless otherwise provided in the instrument, if a trust is created by more than one settlor, each settlor may revoke the trust as to the portion of the trust contributed by that settlor, except as provided in Section 761 of the Family Code." Section 761 of the Family Code gives either settlor acting alone the power to revoke as to community property. Under the commentary for Probate Code §15401 it states "A husband and wife created a trust with community property which expressly allowed revocation "at any time during the lifetime of *either* Trustor." After the wife died, the husband revoked the trust. This was effective only as to his half of the trust corpus because upon the wife's death the community interests were converted into separate property, one half of which belongs to the wife. *In re: Estate of Powell*, 83 Cal.App.4th 1434, 100 Cal.Rptr.2d 501 (3d Dist. 2000)

Probate Code §100 provides: "Upon the death of a married person, one-half of the community property belongs to the surviving spouse and the other half belongs to the decedent.

Declaration of Gary Bagdasarian filed on 3/4/16 states while Probate Code §100 provides that upon the death of a married person, one-half of the community property belongs to the surviving spouse and the other half belongs to the decedent. As indicated in the case of *In re: Estate of Powell*, 83 Cal.App.4th 1434, 100 Cal.Rptr.2d 501 (3d Dist. 2000), a 1991 Trust permitted "revocation during a lifetime of either trustor." The Court goes on to say "thus, to the extent William and Myrtle retained reversionary property in the in the trust assets during Myrtles lifetime by virtue of the right of revocation provided in the trust , those property interest were transmuted from community to separate upon Myrtle's death." In the instant case, there was no reversionary property interest in trust assets because there was no "right of revocation provided in the trust." Consequently, the property interest were not transmuted from community property to separate property upon the death of Thomas J. Zumwalt and remained community property. Therefore Mary Diane Zumwalt has the power to revoke the entire trust composed of community property.

Petitioner: Peggy D. Cruz (pro per)

Petition for Appointment of Guardian of the Person

		TEMPORARY EXPIRES 3/8/16	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need proof of personal service of the Notice of Hearing along with a copy of the petition on: <ol style="list-style-type: none"> a. Everardo Acosta (father) – unless the court dispenses with notice. 2. Need proof of service of the Notice of Hearing along with a copy of the petition on: <ol style="list-style-type: none"> b. Paternal grandparents – unless the court dispenses with notice.
		<p>PEGGY CRUZ, maternal grandmother, is petitioner.</p> <p>Please see petition for details.</p> <p>Court Investigator Report filed on 2/17/16</p>	
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			<p>Reviewed by: KT</p> <p>Reviewed on: 3/2/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13- Mendoza</p>

Petitioner Brenda Tilson (Pro Per)

Petition for Appointment of Guardian of the Person

		TEMPORARY EXPIRES 3/8/2016	NEEDS/PROBLEMS/COMMENTS:
		BRENDA TILSON, maternal grandmother, is Petitioner.	<p>Note: Minute Order dated 1/21/2016 from the hearing on the temporary petition states in pertinent part that the Court orders the Court Investigator to interview all parties and report back to the Court as to whether or not temporary orders should continue to the general petition date.</p> <p>1. Need proof of <u>personal service</u> of the Notice of Hearing with a copy of the Petition for Appointment of Guardian, or Consent to Appointment of Guardian and Waiver of Notice, or a Declaration of Due Diligence, for:</p> <ul style="list-style-type: none"> • Donald Leiffer, father of Jasmine (service by mail filed 1/22/2016 is insufficient); • Jeffrey Jones, father of Brittany, if Court does not find due diligence per declaration filed 1/22/2016; • Jasmine Leiffer, proposed ward (age 16). <p align="center">~Please see additional page~</p>
		~Please see Petition for details~	
Cont. from		Court Investigator's Report was filed on 3/2/2016.	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	ICWA-030	X	
✓	Notice of Hrg		
✓	Aff.Mail	W / O	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 3/3/16
			Updates:
			Recommendation:
			File 14- Jones/ Leiffer

NEEDS/PROBLEMS/COMMENTS, continued:

2. Need proof of service by mail of the *Notice of Hearing* with a copy of the *Petition for Appointment of Guardian, or Consent to Appointment of Guardian and Waiver of Notice, or a Declaration of Due Diligence*, for:
 - Billie Tilson, maternal grandfather;
 - paternal grandparents of Jasmine;
 - paternal grandparents of Brittany;
 - Kegan Jones, half-sibling of Brittany, if age 12 or over;
 - Macy Jones, half-sibling of Brittany, if age 12 or over.

3. Court Investigator's *Report* filed 5/29/2013 indicates the Petitioner reports that she has Cherokee Indian blood, but states that she is not registered; Court Investigator states that an ICWA packet was sent to the Petitioner. Court records do not show the *Notice of Child Custody Proceeding* (Form ICWA-030) has been submitted by Petitioner to the Court for service of notice as required. **Need the *Notice of Child Custody Proceeding (Form ICWA-030)* to be completed by the Petitioner and submitted by her to the Probate Clerk**, in order for the Court to mail this form, together with copies of the petition and attachments, to the child's parents; any Indian custodian; any Indian tribe that may have a connection to the child; the Bureau of Indian Affairs (BIA), and the U.S. Secretary of the Interior, by certified or registered U.S. Mail, return receipt requested. A blank copy of the *Notice of Child Custody Proceeding for Indian Child* (Form ICWA-030) is in the file for Petitioner's use. Petitioner should complete the form and return it to the Probate Clerk as soon as possible.

Petition for Appointment of Guardian of the Person (Initial)

Age: 15 years	TEMPORARY EXPIRES 03/08/2016	NEEDS/PROBLEMS/COMMENTS: Minute Order of 01/20/2016 (Temporary): The Court orders that there shall be no visitation to either parent until they appear before the Court. 1. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian on: <ul style="list-style-type: none"> Cesareo Pimentel (Paternal Grandfather) – Unless the Court dispenses with notice. Note: Declaration of Due diligence filed 01/19/2016.
	JOEL PIMENTEL, JR. brother, is petitioner.	
	<u>Please see petition for details</u>	
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 type="checkbox"/> Notice of Hrg	X	
<input type="checkbox"/> Aff.Mail	X	
<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 type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LV
		Reviewed on: 03/04/2016
		Updates:
		Recommendation:
		File 15- Pimentel

Ex Parte Petition for Limiting the Class of Beneficiaries Whose Consent is Needed to Compel Modification of the Trust §15404

		JAMES S. ANDERSON , Settlor, is Petitioner.	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Note: This petition was filed ex parte on 1/7/16. On 1/20/16, the Court ordered the matter set for hearing on 3/8/16 with 30 days' notice to all interested parties pursuant to §17203.</p> <p>1. Petitioner seeks only to limit the class of beneficiaries whose consent is needed to compel modification under §15404(c), but does not actually seek to compel the modification of this <u>irrevocable</u> trust pursuant to §§15403(a) and 17200(b)(13). Does Petitioner intend to file a separate petition to compel modification in the future? Need clarification.</p>
		Petitioner states he established the Isabella Rose Anderson Trust by declaration of trust dated 7/8/04. Beneficiary Isabella Rose Anderson, a minor, is Petitioner's daughter and the sole beneficiary. The trust is irrevocable; however, pursuant to Probate Code §15404(a), if the settlor and all beneficiaries of a trust consent, they may compel modification or termination of a trust.	
	Aff.Sub.Wit.	Petitioner wishes to amend and restate the trust pursuant to §15404(a) as provided in the First Amendment to and Restatement of the Isabella Rose Anderson Trust attached as Exhibit B.	
✓	Verified	The trust contains certain provisions regarding distribution. Petitioner states he has two minor daughters, the beneficiary and Ava Elizabeth Anderson, a minor. Petitioner also created the Ava Elizabeth Anderson 2008 Irrevocable Trust on 8/1/08, which is similar to the proposed amended trust for Isabella. Settlor seeks to modify Isabella's trust so that his two daughters have identical rights and distribution provisions.	
	Inventory	§15406(c) provides that if the trust provides for the disposition of principal to a class described only as "heirs," the court may limit the class of beneficiaries whose consent is needed to compel the modification to the beneficiaries likely to take under the circumstances, which creates a rebuttable presumption of fertility.	
	PTC	The beneficiaries of the trust reasonably likely to take are:	
	Not.Cred.	a. The beneficiary , who is in good health and there is no heightened risk that she should not live to receive distribution. The beneficiary must therefore consent to modification.	
✓	Notice of Hrg	b. The contingent beneficiaries. Petitioner has one other child, Ava, who is a minor and who presently has no issue. The only contingent beneficiaries likely to take are 1) the beneficiary's potential issue; 2) Ava; and 3) Petitioner's potential issue.	
✓	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		
SEE ADDITIONAL PAGES			
			Reviewed by: skc
			Reviewed on: 3/3/16
			Updates:
			Recommendation:
			File 16A- Anderson

Should the beneficiary die before distribution, her potential issue are next in line to take. The beneficiary benefits from the presumption of fertility and it is likely that she will leave issue. If not, Ava will take. Ava is in good health and it is likely she will live to take. Ava also benefits from the presumption of fertility and it is likely she will leave issue. If not, Petitioner may have future issue who would take pursuant to the terms of the trust. The contingent beneficiaries must consent to the modification of the trust.

Given these circumstances, it is highly unlikely that the trust estate shall ever be distributed to a class of beneficiaries beyond Settlor's existing and potential issue. Petitioner requests the Court limit the class of beneficiaries whose consent is needed to compel modification of the trust to the beneficiary and the contingent beneficiaries because they are the only beneficiaries reasonably likely to take under the circumstances.

Petitioner desires to limit the class of beneficiaries because it will minimize the number of guardians ad litem needed to represent the beneficiaries' interests and it will simplify the process for securing consent by not requiring Petitioner to identify and seek out remotely contingent beneficiaries.

Guardians ad litem: Because the beneficiary is a minor, it is desirable that the court appoint a GAL to represent her interests (§ 15405). Because the contingent beneficiaries are a minor and unascertainable or unborn persons, it is desirable that the court appoint a GAL to represent their interests (§ 15405). Petitioner has therefore filed two additional ex parte petitions seeking appointment of Christine Anderson Holt and Rita K. Mouren to act as GAL for the beneficiary and contingent beneficiaries, respectively.

Please see Exhibit A (trust), Exhibit B (proposed amended trust), and Exhibit C (consent to amendment signed by settlor and proposed GALs).

Wherefore, Petitioner requests an order of this Court limiting the class of beneficiaries whose consent is needed to compel modification of the trust to the Beneficiary and the Contingent Beneficiaries, as defined above; and such further orders and relief as the Court deems proper.

Ex Parte Petition for Appointment of Guardian Ad Litem (Isabella Rose Anderson)

		JAMES S. ANDERSON , Settlor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Petitioner states he is the settlor of the trust and father of the minor child.	
		Petitioner seeks appointment of CHRISTINE ANDERSON HOLT to represent the interests of the minor Isabella Rose Anderson to consent to modification of a trust under which the minor is the beneficiary. See Page A re details.	<p>Note: This petition was filed ex parte on 1/7/16. On 1/20/16, the Court ordered the matter set for hearing on 3/8/16 with 30 days' notice to all interested parties pursuant to §17203.</p> <ol style="list-style-type: none"> A person may not act as a guardian ad litem unless he or she is an attorney or is represented by an attorney. See Note below caption on Petition for Appointment Form DE-350. Petitioner states the proposed GAL is not represented by Baker Manock & Jensen PC. Need clarification re representation of Ms. Holt in connection with this matter. Ms. Holt is the named successor trustee of the trust. The Court may require clarification or authority re possible conflict. It appears Ms. Holt already signed a consent to modification of the trust as GAL on behalf of the minor beneficiary on 12/28/15; however, on that date she had not been appointed. If appointed, further consent may be appropriate.
	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: skc
			Reviewed on: 3/3/16
			Updates:
			Recommendation:
			File 16B- Anderson

**Ex Parte Petition for Appointment of Guardian Ad Litem
 (Issue of Isabella Rose Anderson and Ava Elizabeth Anderson)**

	JAMES S. ANDERSON , Settlor, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>4. A person may not act as a guardian ad litem unless he or she is an attorney or is represented by an attorney. See Note below caption on Petition for Appointment Form DE-350.</p> <p>Petitioner states the proposed GAL is not represented by Baker Manock & Jensen PC. Need clarification re representation of Ms. Mouren in connection with this matter.</p> <p>5. Ms. Mouren is the current trustee of the trust. The Court may require clarification or authority re possible conflict.</p> <p>6. It appears Ms. Mouren already signed a consent to modification of the trust as GAL on behalf of the minor beneficiary on 12/28/15; however, on that date she had not been appointed. If appointed, further consent may be appropriate.</p>
	Petitioner states he is the settlor of the trust and father of the minor child.	
	Petitioner seeks appointment of RITA K. MOUREN to represent the interests of the Issue of minor Isabella Rose Anderson and of the minor Ava Elizabeth Anderson, to consent to modification of a trust under which the above are contingent beneficiaries. See Page A re details.	
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: skc
		Reviewed on: 3/3/16
		Updates:
		Recommendation:
		File 16C- Anderson

17 The Lillie Habib Living Trust dated March 13, 1996

Case No. 16CEPR00080

Attorney: Janet L. Wright (for Petitioner Dan Habib)

Petition for Order Confirming Trust Assets

		<p>DAN HABIB, Successor Trustee, is petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
		<p>Petitioner alleges:</p>	
Cont. from		<p>LILLIE HABIB ("Trustor") created the Lillie Habib Living Trust ("Trust") on March 13, 1996, which was amended by First Amendment to The Lillie Habib Living Trust dated July 30, 2014 ("First Amendment")</p>	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	<p>The Trustor initially appointed herself as Trustee, with her son, Dan Habib to serve as first Successor Trustee. By the terms of the First Amendment Trustor appointed Dan Habib to "act as Trustee of all trust created hereunder." Dan Habib accepted his appointment as Trustee by signing the Receipt by Trustee on page 2 of the First Amendment.</p>	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	<p>Effective immediately upon his signature on July 30, 2014, the sole Trustee of the Trust has been and continues to be Dan Habib.</p>	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	<p>On April 11, 2002, Trustor executed a Grant Deed, which was recorded on April 17, 2002, conveying title to Lillie Habib, as Trustee of the Lillie Habib Living Trust, the real property improved with a duplex located on West Keats Avenue in Fresno ("Keats Duplex")</p>	
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.	<p>Please see additional page</p>	<p>Reviewed by: KT</p> <p>Reviewed on: 3/3/16</p> <p>Updates: 3/7/16</p> <p>Recommendation:</p> <p>File 17- Habib</p>
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

17 The Lillie Habib Living Trust dated March 13, 1996

Case No. 16CEPR00080

On October 5, 2014 (three months after executing the First Amendment appointing Dan Habib as Sole Trustee of the Trust) Lillie Habib, purportedly acting as Trustee of the Trust, executed a Grant Deed purportedly conveying title to the Keats Duplex to Lillie Habib, and unmarried woman and Robert Torres, and unmarried man as joint tenants. The Grant Deed was recorded on October 7, 2014. Mr. Torres was a tenant of the Trustor who resided in one of the units as the Keats Duplex. Petitioner alleges that there was no consideration paid for the transfer.

Petitioner alleges that Trustor was acting under duress and fraudulent inducement when she executed the Grant Deed. Trustor was granted a 5 year Elder Abuse Restraining Order against Mr. Torres on January 22, 2015 in case no. 14CEFL06862 in response to this and other actions taken by Mr. Torres against Trustor. Trustor was placed under conservatorship with the Public Guardian as Conservator of her person and Dan Habib as conservator of her estate on February 17, 2015.

Petitioner believes that his mother, the Trustor, intended by establishing the Trust to avoid probate administration of her estate and that she intended for her son, Dan Habib to hold all property, whether real or otherwise, as Trustee of her Trust. Petitioner further believes that his mother was coerced and/or fraudulently induced into executing the Grant Deed purportedly transferring the interest in the Keats Duplex out of the Trust to Robert Torres and herself as joint tenants.

Wherefore, Petitioner prays for an Order:

1. That the Court find that the purported transfer of the real property located on West Keats Avenue in Fresno was invalid.
2. The Court make an order determining that the real property located on West Keats Avenue in Fresno is determined to be an asset of the Lillie Habib Living Trust and subject to the management and control of Dan Habib as Trustee of the Trust.

Petition for Probate of Will and for Letters Testamentary. Authorization to Administer under the Independent Administration of Estates Act

DOD: 1/5/2016		<p>JOHN SLATER, friend/named Executor with full IAEA without bond is petitioner</p> <p>Full IAEA – o.k.</p> <p>Will dated: 6/25/2015</p> <p>Residence: Fresno Publication: Business Journal</p> <p>Estimated value of estate: Personal property \$ 10,000.00 Real property: \$ 175,907.00 Total \$185,907.00</p> <p>Probate Referee: Steven Diebert</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need original Will.</p> <p>Note: If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> • Tuesday, August 9, 2016 for filing Inventory and Appraisal • Tuesday, May 9, 2017 for filing the first account or petition for final distribution <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit. S/P		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail W/O		
<input checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input 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 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		
		Reviewed by: SEF	
		Reviewed on: 3/1/2016	
		Updates:	
		Recommendation:	
		File 18- Deelen	

Petition for Letters of Administration; Authorization to Administer Under the IAEA

DOD: 8/27/2015		<p>ROBERT ROBLEDO, son is petitioner and requests appointment as Administrator with full IAEA without bond</p> <p>All heirs waive bond (see Note 1)</p> <p>Full IAEA – o.k.</p> <p>Decedent died intestate</p> <p>Residence: Reedley Publication: Reedley Exponent</p> <p>Estimated value of estate: Personal property: \$ 500.00 Annual gross income: \$ 12,600.00 Real property: \$ 120,000.00 Total \$ 133,100.00</p> <p>Probate Referee: Rick Smith</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Petition states all heirs at law are adults and have waived bond. However, one of the heirs is a minor (Brianna Robledo – age 12) and cannot waive bond. Therefore, bond of \$133,100 may be required.</p> <p>Note: If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> • Tuesday, August 9, 2016 for filing Inventory and Appraisal • Tuesday, May 9, 2017 for filing the first account or petition for final distribution <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
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 type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail W/		
<input checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input 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 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		
		Reviewed by: SEF	
		Reviewed on: 3/2/2016	
		Updates: 3/4/2016	
		Recommendation:	
		File 19- Robledo	

Petition for Letters of Administration; Authorization to Administer Under the IAEA

DOD: 3/29/2015		<p>PATRICIA J. BLAIR, daughter is petitioner and requests appointment as Administrator with full IAEA without bond</p> <p>All heirs waive bond</p> <p>Full IAEA – o.k.</p> <p>Decedent died intestate</p> <p>Residence: Kerman</p> <p>Publication: The Kerman News</p> <p>Estimated value of estate: Personal property: \$ 1,859.00 Real property: \$ 198,718.00 Total \$ 200,577.00</p> <p>Probate Referee: Rick Smith</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> • Tuesday, August 9, 2016 for filing Inventory and Appraisal • Tuesday, May 9, 2017 for filing the first account or petition for final distribution <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
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 type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail W/		
<input checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input 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 type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: SEF</p> <p>Reviewed on: 3/2/2016</p> <p>Updates:</p> <p>Recommendation: SUBMITTED</p> <p>File 20- Clement</p>	

**Petition for Probate of Will and for Letters of Administration with Will Annexed;
 Authorization to Administer Under the IAEA**

DOD:11/21/2015	MITCHELL EPPERLY , nominee and former spouse is petitioner and requests appointment as Administrator with will annexed with full IAEA without bond	NEEDS/PROBLEMS/COMMENTS: 1. Page 2 of petition is missing; therefore, unable to determine: <ul style="list-style-type: none"> a. estimated value of estate b. confirm residence information of petitioner 2. Copy of holographic will is not attached to the proofs of holographic instrument as required. Note: If granted, the Court will set status hearings as follows: <ul style="list-style-type: none"> • Tuesday, August 9, 2016 for filing Inventory and Appraisal • Tuesday, May 9, 2017 for filing the first account or petition for final distribution Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
Cont. from		
<input checked="" type="checkbox"/> Proof of Hol. Inst.	Full IAEA – o.k.	
<input checked="" type="checkbox"/> Verified	Holographic will dated: 4/30/2007	
Inventory	Residence: Fresno	
PTC	Publication: Business Journal	
Not.Cred.		
Notice of Hrg	Estimated value of estate: (see Note 1)	
<input checked="" type="checkbox"/> Aff.Mail W/	Personal property \$	
<input checked="" type="checkbox"/> Aff.Pub.	Annual income \$	
Sp.Ntc.	Real property: \$	
Pers.Serv.	Total \$	
Conf. Screen	Probate Referee: Steven Diebert	
<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		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: SEF
		Reviewed on: 3/2/2016
		Updates: 3/3/2016
		Recommendation:
		File 21- Epperly

Attorney

Burnside, Leigh W. (for Petitioners Patti D. Houston and Janice M. Rush)

Attorney

Petty-Jones, Teresa (for Proposed Conservatee Wilma Dell Tashjian)

Attorney

Istanboulian, Flora (Court appointed for Proposed Conservatee Wilma Dell Tashjian)

Petition for Appointment of Probate Conservator of the Person and Estate

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:
			Court Investigator advised rights on 1/19/16
			<u>Minute Order 2/23/16</u> : Wilma Tashjian objects to a conservatorship of the person but consents to the Public Guardian being appointed as to the estate. The matter is continued to allow Ms. Burnside time to speak to her clients. The Court orders that all estate planning documents are still rendered null and void.
Cont. from 022316			<u>Note</u> : Various protective orders remain in place.
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
✓	Objections		
	Video Receipt	X	
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		Reviewed by: skc
	Status Rpt		Reviewed on: 3/2/16
	UCCJEA		Updates:
✓	Citation		Recommendation:
	FTB Notice		File 22A- Tashjian

22A

22B Wilma Dell Tashjian (CONS/PE) Case No. 16CEPR00056

Attorney Burnside, Leigh W. (for Petitioners Patti D. Houston and Janice M. Rush)
 Attorney Petty-Jones, Teresa (for Proposed Conservatee Wilma Dell Tashjian)
 Attorney Istanboulian, Flora (Court appointed for Proposed Conservatee Wilma Dell Tashjian)

Ex Parte Application for Order Authorizing Completion of Capacity Declaration - HIPAA

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 2/23/16:</u> Wilma Tashjian objects to a conservatorship of the person but consents to the Public Guardian being appointed as to the estate. The matter is continued to allow Ms. Burnside time to speak to her clients. The Court orders that all estate planning documents are still rendered null and void.</p> <p><u>Note:</u> This application was filed ex parte on 1/29/16. The Court's order of 1/29/16 set the matter for hearing with 15 days' notice. Notice of hearing was subsequently served on all interested parties on 1/29/16.</p>	
Cont. from 022316				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
<p>Reviewed by: skc</p>				
<p>Reviewed on: 3/2/16</p>				
<p>Updates:</p>				
<p>Recommendation:</p>				
<p>File 22B- Tashjian</p>				

22B

23 Riley Mae Hornor & Fallon Q. Cutting (GUARD/P) Case No. 13CEPR00464

Petitioner Hornor, Erica (Pro Per – Cousin)

Petitioner Hornor, Jason (Pro Per – Cousin)

Petition for Appointment of Temporary Guardian of the Person

Age: 1		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR.</u> <u>DISMISSAL ENTERED</u> <u>03/03/2016.</u></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: LV
		Reviewed on: 03/03/2016
		Updates:
		Recommendation:
		File 23- Hornor / Cutting

Attorney **Robyn L. Esraelian (for Petitioner Gale Rustigian, Administrator)**

Waiver of Accounting and Petition for Allowance of Statutory Fees to Administrator and Attorney for Administrator, and Petition for Final Distribution

DOD: 11/07/2014	GALE RUSTIGIAN , mother and Administrator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: This matter will be heard in Dept. 54 at 8:30 a.m.
	I & A - \$267,500.00	
	POH - \$68,378.86 (all cash)	
Cont. from 012716		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Administrator - waives fees	
<input checked="" type="checkbox"/> Inventory		
<input checked="" type="checkbox"/> PTC	Attorney - \$5,000.00 <i>(less than \$8,350.00 statutory)</i>	
<input checked="" type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Distribution pursuant to intestate succession is to:	
<input checked="" type="checkbox"/> Aff.Mail W/	MAKAYLA RUSTIGIAN - \$63,378.86 cash	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters 070615		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input checked="" type="checkbox"/> FTB Notice		
		Reviewed by: JF / LEG
		Reviewed on: 3/4/16
		Updates:
		Recommendation: SUBMITTED
		File 1- Rustigian