

**(1) Petition for Settlement of Second and Final Account; (2) Petition for Final Distribution and (3) for Allowance of Compensation for Ordinary Services (Prob. C. 11640)**

<b>DOD: 1/3/05</b>	<b>JAMES C. DOBBS</b> , Executor, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<u><b>Account period: 1/1/10-1/27/12</b></u>	
<b>Cont. from</b>	Accounting - <b>\$165,750.00</b>	
<b>Aff.Sub.Wit.</b>	Beginning POH - <b>\$165,750.00</b>	
<input checked="" type="checkbox"/> <b>Verified</b>	Ending POH - <b>\$ 24,431.45</b>	
<b>Inventory</b>	(all cash)	
<b>PTC</b>	Executor - <b>\$1,550.00</b>	
<b>Not.Cred.</b>	(statutory)	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Attorney - <b>\$1,550.00</b>	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	(statutory)	
<b>Aff.Pub.</b>	Costs advanced by Executor - <b>\$3,423.74</b>	
<b>Sp.Ntc.</b>	(2010 and 2011 Gas, Water & Electric, Property Insurance, Property Taxes)	
<b>Pers.Serv.</b>	Closing Reserve - <b>\$1,000.00</b>	
<b>Conf. Screen</b>	<u><b>Petitioner states the Estate is insolvent and</b></u>	
<b>Letters</b>	<u><b>that the remaining balance of the Estate</b></u>	
<b>Duties/Supp</b>	<u><b>will be distributed to the State of California</b></u>	
<b>Objections</b>	<u><b>– Department of Health Care Services (two</b></u>	
<b>Video Receipt</b>	<u><b>claims filed in 6/2006, totaling \$35,011.57.)</b></u>	
<b>CI Report</b>	<b>Petitioner prays for an order:</b>	
<b>9202</b>	1. That the first account current and report	
<input checked="" type="checkbox"/> <b>Order</b>	be ratified, approved and confirmed;	
<b>Aff. Posting</b>	2. That the remaining balance of the Estate	
<b>Status Rpt</b>	be distributed to the Department of Health	
<b>UCCJEA</b>	Care Services;	
<b>Citation</b>	3. That any Estate property not now known	
<b>FTB Notice</b>	or discovered should be distributed as	
	follows: to the Department of Health Care	
	Services in the amount necessary to	
	satisfy its total claims, and the balance to	
	be distributed 1/3 to James Dobbs, 1/3 to	
	Donna Williamson and 1/3 to the Estate	
	of Timothy Dobbs.	
	<b>Reviewed by: NRN</b>	
	<b>Reviewed on: 3/5/12</b>	
	<b>Updates:</b>	
	<b>Recommendation:</b>	
	<b>File 1 - Dobbs</b>	

**Probate Status Hearing Re: First Account or Final Distribution**

<b>DOD: 9/17/2010</b>	<p><b>LEONOR BUEVARA DE BERRERA</b> was appointed Administrator with full IAEA and without bond on 1/16/11.</p> <p>Minute Order dated 3/1/11 amended the order to allow only LIMITED IAEA authority.</p> <p>I &amp; A filed on 6/17/11 indicates the value of the estate is \$98,000.00</p> <p>First account or a petition for final distribution is now due.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need current status report, first account or petition for final distribution.</p>
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<p><b>Reviewed by: KT</b></p>	
	<p><b>Reviewed on: 3/5/12</b></p>	
	<p><b>Updates:</b></p>	
	<p><b>Recommendation:</b></p>	
	<p><b>File 2 - Barrera</b></p>	

**(1) First and Final Account and Report of Administrator, (2) Petition for Attorney Fees and (3) Final Distribution**

<b>DOD: 12-13-10</b>	<b>MARIA R. CABRERA</b> , Sister and Administrator with Limited IAEA with bond of \$10,000.00, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p style="text-align: center;"><b><u>OFF CALENDAR</u></b></p> <p><b>(CALENDAR IN ERROR)</b></p> <p>This matter was continued from 2-14-12 to 3-26-12 at Attorney Ramos' request on 2-9-12.</p>
<b>Cont. from 021412</b>	Accounting is waived.	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	I&A: \$275,000.00	
<input checked="" type="checkbox"/> <b>Verified</b>	POH: \$14,951.35 cash plus real property in Los Angeles County)	
<input checked="" type="checkbox"/> <b>Inventory</b>	Administrator (Statutory): Waived	
<input checked="" type="checkbox"/> <b>PTC</b>	Attorney (Statutory): \$8,500.00	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	<b>Distribution pursuant to intestate succession:</b>	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Graciela F. Larios (Decedent's mother): 100% of the estate	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> W		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b> 5-5-11		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<input checked="" type="checkbox"/> <b>9202</b>		
<b>Order</b> X		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>		
		<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 3-6-12</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p>File 3 - Larios</p>

(1) First and Final Account and Report of Executor and Petition for Its Settlement,  
 (2) for Allowance of Statutory Fees and Commissions and (3) for Final Distribution  
 (Prob. C. 11002, 10800, 10810, 11640)

<b>DOD: 12/1/2010</b>		<b>JACQUELINE J. JOHNS</b> , Executor, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Account period: 12/1/2010 – 12/15/2011	<p>1. Summary of Account incorrectly lists the property on hand as \$38,025.07. It appears that the correct amount (as listed in the property on hand schedule) is \$37,977.11.</p> <p>2. Need Order</p>
<b>Cont. from</b>		Accounting - <b>\$110,108.80</b>	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - <b>\$110,000.00</b>	
<input checked="" type="checkbox"/>	Verified	Ending POH - <b>\$ 38,025.07</b>	
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.	Administrator - <b>\$3,164.35</b> (statutory)	
<input checked="" type="checkbox"/>	Notice of Hrg	Administrator costs- <b>\$4,970.38</b> (for upkeep on the real property, including taxes, insurance and maintenance.)	
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	Attorney - <b>\$3,164.35</b> (statutory)	
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters	6/6/2011	
<input type="checkbox"/>	Duties/Supp	Closing reserve - <b>\$500.00</b>	
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt	<b>Distribution, pursuant to Decedent's Will, is to:</b>	
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input type="checkbox"/>	Order	Miles Seward - <b>\$26,358.03</b>	
<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: KT
			Reviewed on: 3/5/12
			Updates:
			Recommendation:
			File 4 - Johns

(1) First and Final Report of Executor of Decedent's Will and (2) Petition for its Settlement, for Statutory Fees Due Attorneys, and for (3) Final Distribution of Estate on Waiver of Accounting (Prob. C. 11600)

<b>DOD: 11/26/2010</b>		<b>JOHN DAVID ANDERSON,</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Executor, is petitioner.	
		Accounting is waived.	
<b>Cont. from</b>			
	Aff.Sub.Wit.	I & A - <b>\$219,948.75</b>	
✓	Verified	POH - <b>\$220,853.24</b>	
✓	Inventory	Executor - <b>waives</b>	
✓	PTC		
✓	Not.Cred.	Attorney - <b>\$7,399.00</b>	
✓	Notice of Hrg	(statutory)	
✓	Aff.Mail	Costs - <b>\$1,225.00</b>	
	Aff.Pub.	(filing fees, publication, certified copies)	
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen	<b>Distribution, pursuant to Decedent's Will, is to:</b>	
✓	Letters	6/29/11	
	Duties/Supp	John David Anderson -	
	Objections	\$15,736.00 and the 2004 Volvo.	
	Video Receipt	Edwin D. Huff as Trustee of the John S. and Barbara Dodd Anderson Revocable Trust - \$186,993.24	
	CI Report		
✓	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
✓	FTB Notice		
			Reviewed by: KT
			Reviewed on: 3/6/12
			Updates:
			Recommendation: <b>SUBMITTED</b>
			File 5 - Anderson

**(1) Petition for Final Distribution on Waiver of Account and (2) for Allowance of Compensation for Ordinary Services (Independent Administration)**

<b>DOD: 6/26/2011</b>		<p><b>THERESA M. PIERSON</b>, Executor, is petitioner.</p> <p>Accounting is waived.</p> <p>I &amp; A - <b>\$165,000.00</b>          POH - <b>\$165,000.00</b></p> <p>Executor - <b>waives</b></p> <p>Attorney (statutory) - <b>\$5,950.00</b></p> <p>Closing - <b>\$50.00</b></p> <p><b>Distribution, pursuant to Decedent's Will, is to:</b></p> <p><b>Theresa M. Pierson</b> - Real property located at 7615 N. Baird, Fresno.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>	
<b>Cont. from</b>				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input checked="" type="checkbox"/>	PTC			
<input checked="" type="checkbox"/>	Not.Cred.			
	Notice of Hrg			N/A
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			9/20/11
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
<input checked="" type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
<input checked="" type="checkbox"/>	FTB Notice			
		Reviewed by: KT		
		Reviewed on: 3/6/12		
		Updates:		
		Recommendation: SUBMITTED		
		File 6 - Barrick		

	<p><b>GEORGIANNE H. ERROTABERE</b>, Trustee and Beneficiary, and Beneficiaries <b>DANIEL DOMINGO ERROTABERE</b>, <b>JEAN EMILE ERROTABERE</b>, and <b>REMI PHILLIP ERROTABERE</b>, are Petitioners.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p style="text-align: center;"><b><u>OFF CALENDAR</u></b></p>			
<p><b>Continued from 1-18-12, 02-16-12</b></p>	<p><b>Petitioners state</b> the Jean Errotabere Testamentary Trust was created by court order 4-29-1980 and amended by court order dated 6-6-1989.</p>	<p><b>Order signed 2-21-12.</b></p>			
<table border="1"> <tr> <td data-bbox="34 394 89 436"></td> <td data-bbox="89 394 277 436"><b>Aff.Sub.Wit.</b></td> <td data-bbox="277 394 358 436"></td> </tr> </table>		<b>Aff.Sub.Wit.</b>			
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<input checked="" type="checkbox"/>	<b>Verified</b>				
<table border="1"> <tr> <td data-bbox="34 478 89 520"></td> <td data-bbox="89 478 277 520"><b>Inventory</b></td> <td data-bbox="277 478 358 520"></td> </tr> </table>		<b>Inventory</b>		<p>Petitioner Georgianne H. Errotabere is the original and present trustee, and wishes to resign. The two named successor trustees, Donald Yraceburu and Wells Fargo Bank (successor to Crocker Bank), both indicate that they would decline to serve if appointed, and have both signed declinations (Exhibits B and C).</p>	
	<b>Inventory</b>				
<table border="1"> <tr> <td data-bbox="34 520 89 562"></td> <td data-bbox="89 520 277 562"><b>PTC</b></td> <td data-bbox="277 520 358 562"></td> </tr> </table>		<b>PTC</b>			
	<b>PTC</b>				
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<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W/O			
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	<b>Aff.Pub.</b>				
<table border="1"> <tr> <td data-bbox="34 730 89 772"></td> <td data-bbox="89 730 277 772"><b>Sp.Ntc.</b></td> <td data-bbox="277 730 358 772"></td> </tr> </table>		<b>Sp.Ntc.</b>		<p>The trust does not provide mechanism for further appointment. Petitioners seek to modify the trust so that upon the resignation of Georgianne H. Errotabere, the three sons of the trustor and Georgianne H. Errotabere, Petitioners and Beneficiaries Daniel Errotabere, Jean Errotabere and Remi Errotabere are appointed successor co-trustees, with the survivors or survivor thereof serving as co-trustees or sole trustee. Upon the death or resignation of the proposed sole successor trustee, a successor trustee may be chose by the unanimous written consent of the adult beneficiaries and the parents or guardians of minor beneficiaries without court approval.</p>	
	<b>Sp.Ntc.</b>				
<table border="1"> <tr> <td data-bbox="34 772 89 814"></td> <td data-bbox="89 772 277 814"><b>Pers.Serv.</b></td> <td data-bbox="277 772 358 814"></td> </tr> </table>		<b>Pers.Serv.</b>			
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<table border="1"> <tr> <td data-bbox="34 898 89 940"></td> <td data-bbox="89 898 277 940"><b>Duties/Supp</b></td> <td data-bbox="277 898 358 940"></td> </tr> </table>		<b>Duties/Supp</b>			
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<table border="1"> <tr> <td data-bbox="34 982 89 1024"></td> <td data-bbox="89 982 277 1024"><b>Video Receipt</b></td> <td data-bbox="277 982 358 1024"></td> </tr> </table>		<b>Video Receipt</b>			
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	<b>9202</b>				
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<input checked="" type="checkbox"/>	<b>Order</b>				
<table border="1"> <tr> <td data-bbox="34 1150 89 1192"></td> <td data-bbox="89 1150 277 1192"><b>Aff. Posting</b></td> <td data-bbox="277 1150 358 1192"></td> </tr> </table>		<b>Aff. Posting</b>			
	<b>Aff. Posting</b>				
<table border="1"> <tr> <td data-bbox="34 1192 89 1234"></td> <td data-bbox="89 1192 277 1234"><b>Status Rpt</b></td> <td data-bbox="277 1192 358 1234"></td> </tr> </table>		<b>Status Rpt</b>		<p>No bond would be required of any trustee or successor trustee named in or appointed pursuant to the terms of the trust. No other trust provisions would be modified.</p>	
	<b>Status Rpt</b>				
<table border="1"> <tr> <td data-bbox="34 1234 89 1276"></td> <td data-bbox="89 1234 277 1276"><b>UCCJEA</b></td> <td data-bbox="277 1234 358 1276"></td> </tr> </table>		<b>UCCJEA</b>			
	<b>UCCJEA</b>				
<table border="1"> <tr> <td data-bbox="34 1276 89 1318"></td> <td data-bbox="89 1276 277 1318"><b>Citation</b></td> <td data-bbox="277 1276 358 1318"></td> </tr> </table>		<b>Citation</b>			
	<b>Citation</b>				
<table border="1"> <tr> <td data-bbox="34 1318 89 1753"></td> <td data-bbox="89 1318 277 1753"><b>FTB Notice</b></td> <td data-bbox="277 1318 358 1753"></td> </tr> </table>		<b>FTB Notice</b>		<p>All present beneficiaries and all adult contingent beneficiaries consent to the modification pursuant to Probate Code §15403 and waive notice of hearing.</p> <p>Petitioners also refer to Probate Code §15409 with respect to modification based on changed circumstances, and state that the trustor could not have known over 30 years ago that the two successor trustees would decline to serve.</p> <p><b>Petitioners state that because the present trustee wishes to resign, modification of the trust is necessary to provide mechanism for appointment of successor trustees that is valid and not subject to question, challenge or delay.</b></p>	<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 3-6-12</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 7 - Errotabere</b></p>
	<b>FTB Notice</b>				

**Consideration of Dementia Powers**

Age: 83	<p><b>The FRESNO COUNTY PUBLIC GUARDIAN</b> was appointed Conservator of the Person and Estate of <b>HARRY SAGER</b> on 2-21-12 with medical consent powers.</p> <p><b>At the hearing on 2-21-12</b>, the Court set this hearing for consideration of dementia powers.</p> <p><b>A Capacity Declaration was filed 2-24-12.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. <b>The Capacity Declaration of Dr. Antoniou filed 2-24-12 is incomplete:</b></p> <ul style="list-style-type: none"> <li>- It does not provide Dr. Antoniou’s office address and phone number at #1 and 2.</li> <li>- It does not indicate the date that Mr. Sager was seen or whether he is a patient under Dr. Antoniou’s continuing treatment or not at #4</li> <li>- Dr. Antoniou’s signatures are not dated on Pages 1, 3, or 4.</li> <li>- Mr. Sager’s name appears only on Page 1 and is not written on any subsequent pages. The continuity of the document is unclear.</li> </ul>
DOB: 5-10-28		
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: 3-6-12	
	Updates:	
	Recommendation:	
	File 8 - Sager	

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

<b>DOD: 11/26/2011</b>	<b>ALFRED DANIEL</b> , named executor without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Full IAEA – o.k.	
<b>Cont. from</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Will dated: 9/29/1995	
<input checked="" type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>	Residence: Fresno	
<input type="checkbox"/> <b>PTC</b>	Publication: Fresno Business Journal	
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>	<b>Estimated value of the estate:</b>	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> W/	Personal property - \$ 1,000.00	
<input type="checkbox"/> <b>Aff.Pub.</b>	Real property - <u>\$19,105.00</u>	
<input type="checkbox"/> <b>Sp.Ntc.</b>	<b>Total - \$20,105.00</b>	
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>	<b>Probate Referee: Steven Diebert</b>	
<input checked="" type="checkbox"/> <b>Letters</b>		
<input checked="" type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by: KT</b>
		<b>Reviewed on: 3/6/12</b>
		<b>Updates: 3/9/12</b>
		<b>Recommendation: SUBMITTED</b>
		<b>File 9 - Daniel</b>

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

<b>DOD: 10/11/11</b>	<b>ROBERT JONES and DENISE JONES</b> , are petitioners and request appointment as Administrators without bond.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>1. Petition indicates all heirs waive bond. Need bond waivers from all heirs or bond set in the amount of \$195,000.00</b>
<b>Cont. from</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Full IAEA – o.k.	
<input checked="" type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>	Decedent died intestate	
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>	Residence: Fresno	
<input type="checkbox"/> <b>Notice of Hrg</b>	Publication: Fresno Business Journal	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	W/	
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>	<b>Estimated value of the estate:</b>	
<input type="checkbox"/> <b>Pers.Serv.</b>	Personal property - \$150,000.00	
<input type="checkbox"/> <b>Conf. Screen</b>	Real property - \$ 45,000.00	
<input checked="" type="checkbox"/> <b>Letters</b>	<b>Total - \$195,000.00</b>	
<input checked="" type="checkbox"/> <b>Duties/Supp</b>	<b>Probate Referee: RICK SMITH</b>	
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by: KT</b>
		<b>Reviewed on: 3/7/12</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 10 - Rutherford</b>

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 1/19/12		<b>STEVEN R. THOMAS, II</b> , son, is petitioner and requests appointment as Executor without bond.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Note:</u> Decedent's Will contains handwritten interlineations removing Steven R. Thomas, II and Carl E. Thomas as Executors and inserting Kristy Helm Thomas (daughter) in their place. Declaration of Petitioner filed on 2/9/12 states that based upon his experiences with the handwriting he believes the interlineations were done by someone other than the decedent.	
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 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			
		<b>STEVEN R. THOMAS, II</b> was appointed as Special Administrator. Letters of Special Administration expire on 3/14/12.		
		Full IAEA – o.k.		
		Will dated: 5/13/2003		
		Residence: Kingsburg		
		Publication: Kingsburg Recorder		
		<b>Estimated value of the estate:</b> Personal property - \$ 3,000.00 <u>Real property</u> - <u>\$123,000.00</u> <b>Total</b> <b>\$126,000.00</b>		
		<b>Probate Referee: Steven Diebert</b>		
			Reviewed by: KT Reviewed on: 3/7/12 Updates: Recommendation: File 11 - Thomas	

Age: 86	<p><b>LAVONNE ILENE BOLAND</b>, Daughter, was appointed Conservator of the Person and Estate with additional powers under Probate Code §2590 with bond of \$10,000.00 on 3-28-08. Bond was filed and Letters issued on 4-24-08.</p> <p><b>I&amp;A filed 8-27-08</b> reflected a total value of the conservatorship estate of \$65,826.31, consisting of a one-half interest in real property in Squaw Valley, CA, a one-half interest in a mare registered as a National Show Horse, a one-half interest in two kilns, and various interests in other personal property.</p> <p><b>On 2-11-09</b>, the Court authorized Conservator to fix Conservatee’s residence outside the State of California. Post-Move Notice of Change of Residence reflects a new address in Bend, OR.</p> <p><b>On 8-12-09</b>, the first account was settled.</p> <p><b>On 9-22-09</b>, revised Letters were issued reflecting only Conservatorship of the Estate, as the equivalent of a Conservatorship of the Person was obtained in Oregon, and this Court retained jurisdiction over the estate.</p> <p><b>The next account is now due.</b> The Court set this status hearing and sent notice to Conservator and Attorney Feigel on 11-3-11.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order 1-11-12:</b> Counsel informs the Court that his client is trying to put things together and there are no more assets in the estate. Counsel requests a continuance. Counsel is informed that there is an outstanding fee of \$860.00 that needs to be paid.</p> <p><u>As of 3-6-12, nothing further has been filed and fees have not been paid. The following issues remain:</u></p> <ol style="list-style-type: none"> <li>1. Need Second Account Current.</li> <li>2. Outstanding fees of \$860.00 are due to the Court Investigator’s Office for prior investigations.</li> </ol>
DOB: 4-2-25		
Cont. from 011112		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202 Order		
Aff. Posting		
Status Rpt X		
UCCJEA		
Citation		
FTB Notice		
Reviewed by: skc		
Reviewed on: 3-6-12		
Updates:		
Recommendation:		
File 12 - Squires		

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

<b>DOD: 8-29-08</b>	<p><b>DIANE PICKERING</b> was appointed Executor with Full IAEA without bond and Letters issued on 1-13-09.</p> <p><b>On 1-26-12</b>, the Court set this status hearing for failure to file a First Account or Petition for Final Distribution.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li><b>Need Inventory and Appraisal.</b></li> <li><b>Need First Account Current or Petition for Final Distribution pursuant to Probate Code §12200.</b></li> </ol> <p><u>Note:</u> The original petition indicated an estimated estate value of \$130,000.00 in personal property.</p> <p><u>Note:</u> Decedent’s will devises the entire estate to The Mildred Pearl Rancilio Living Trust.</p>
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b> X		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 3-6-12</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 13 - Rancilio</b></p>	

Atty Combs, Zachary W. (Pro Per – Father – Petitioner)  
Atty Crisp, Renee Gail (Pro Per – Maternal Grandmother – Guardian)  
Petition for Termination of Guardianship

Kaitlyn Madison Combs (4) DOB: 3-9-07	<b>ZACHARY COMBS</b> , Father, is Petitioner.	<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <p><u>Minute Order 1-11-12</u>: The Court orders Guardian Renee Crisp submit herself for testing today at Global Testing. The Court further orders that a urine and hair follicle test be conducted for Methamphetamines and Cannabis. Additionally, the Court orders that Taylor Rogers not have any unsupervised contact with the minors. The minors are not to be in any vehicle unless the driver is licensed and insured. The Court orders the Court Investigator conduct further investigation as to where Father is living, and Guardian's relationship with her significant other with respect to the domestic violence and restraining order issues.</p> <p><u>Note: Brittney Crisp (Mother) filed a new Petition for Termination of Guardianship on 1-26-12 that is set for hearing on 3-28-12.</u></p> <p><u>If this matter goes forward, the following issues exist:</u></p> <p style="text-align: center;"><b>SEE PAGE 2</b></p> <p>Reviewed by: skc</p> <p>Reviewed on: 3-6-12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 14 - Combs</p>
Sierra Lindsay Combs (3) DOB: 12-26-08	<b>RENEE GAIL CRISP</b> , Maternal Grandmother, was appointed Guardian on 10-1-09.	
Sienna Renee Combs (3) DOB: 12-26-08	Mother: <b>BRITNEY CRISP</b>	
	Maternal Grandfather: John Thomas Hall	
	Paternal Grandfather: Jamie Combs	
	Paternal Grandmother: Pamela Loman	
Cont. from 011112		
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		
✓ Clearances		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

**14 Kaitlyn Combs, Sierra Combs and  
Cienna Combs (GUARD/P)**

**Case No. 09CEPR00613**

**Atty Combs, Zachary W. (Pro Per – Father – Petitioner)**  
**Atty Crisp, Renee Gail (Pro Per – Maternal Grandmother – Guardian)**  
**Petition for Termination of Guardianship**

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**NEEDS/PROBLEMS/COMMENTS (Continued):**

**If this matter goes forward, the following issues exist:**

- 1. Need Notice of Hearing.**
- 2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing or consent and waiver of notice or declaration of due diligence on:**
  - Renee Gail Crisp (Guardian)**
  - Britney Crisp (Mother)**
  - Thomas Hall (Maternal grandfather)**
  - Jamie Combs (Paternal Grandfather)**
  - Pamela Loman (Paternal Grandmother)**

Status Hearing Re: Filing of the First Account or Petition for Final Distribution

<b>DOD: 7/11/10</b>	<p><b>JONATHAN BEYER</b> was appointed Administrator with full IAEA without bond on 9/15/10.</p> <p>Inventory and Appraisal filed 2/28/11 reflects a total estate value of \$353,473.00, including \$67,773.00 cash, real properties, a vehicle, furnishings and personal effects, and a sole proprietorship (“Boxcar Cafe”).</p> <p>On 9/15/11, the court set a status hearing for filing of the first account or petition for final distribution for 11/9/11.</p> <p>Minute Order from 11/9/2011 states there were no appearances at the status hearing. The court set the matter for Order to Show Cause and ordered Jonathan Beyer to be present on 1/25/12 and have the first account filed.</p> <p><b>Minute Order from 1/25/12 state the Court dispenses with the Order to Show Cause. Mr. Beyer is directed to file a first account or petition for final distribution.</b></p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<u>As of 3-6-12, nothing further has been filed.</u>	
		1. Need first account current or petition for final distribution.	
<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>	X		
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
		<b>Reviewed by:</b> skc	
		<b>Reviewed on:</b> 3-6-12	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 15 - Beyer</b>	

**(1) Petition for Settlement of First and Final Account and (2) for Final Distribution and (3) Fixing and Allowing Compensation**

<b>DOD: 11-13-10</b>		<b>CHERYL LYNN MIGUEL</b> , Administrator with Limited IAEA without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Petitioner states notice was not given to the California Department of Health Care Services Recovery Section because "petitioner believed that the decedent did not receive health care paid for by the state."  Probate Code §9202(a) requires notice if the administrator "knows or has reason to know that the decedent received health care...or was the surviving spouse of a person who received that health care."  Examiner notes that the decedent did have a predeceased spouse. The Court may require clarification on the record or further written declaration regarding compliance with this section.  2. Petitioner does not make a statement regarding whether notice was required or given pursuant to Probate Code §9202(b) (notice to the California Victim Compensation and Government Claims Board).  3. Petitioner does not state whether notice was sent to the Franchise Tax Board pursuant to Probate Code §9202(c).  <b>SEE PAGES 2-3</b>
		Account period: 11-13-10 through 1-15-12	
		Accounting: \$187,809.70	
		Beginning POH: \$182,071.03	
		Ending POH: \$137,012.89	
		Administrator (Statutory): \$6,611.21	
		Closing: \$250.00	
		<b>Distribution pursuant to intestate succession:</b>	
		Renee Lucille Austin: \$38,474.13	
		Cheryl Lynn Miguel: \$38,474.13	
		Charlie Joseph Miguel: \$38,474.13	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" 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.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters	8-17-11	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202	X	
<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	X	
<b>Reviewed by:</b> skc			
<b>Reviewed on:</b> 3-6-12			
<b>Updates:</b>			
<b>Recommendation:</b>			
<b>File 16 – Highly</b>			

NEEDS/PROBLEMS/COMMENTS (Continued):

4. Petitioner states there were no Creditor's Claims received; however, two Creditor's Claims were filed:

- American Infosource as agent for Bank of America filed 3-28-11 for \$1,385.00
- DCM Services for GE Money Bank JC Penney Consumer filed 4-4-11 for \$1,161.55

Examiner notes that the Disbursements Schedule indicates payment directly to JC Penney and Bank of America in amounts similar to the claim amounts, but does not reference the Creditor's Claims that were filed, and does not address whether payment or notice was made to the agents that filed the claims.

Therefore, need:

- Allowance or Rejection of Creditor's Claims for the above claims with proof of service on the appropriate parties

and

- Clarification as to whether the payments made were appropriate.

5. Disbursements Schedule indicates that Petitioner made preliminary distributions of \$20,080.46, which was the amount identified in a CD account at Balboa Thrift & Loan per the Inventory and Appraisal.

Petitioner did not seek or receive Court approval for preliminary distribution per Probate Code §11623.

Need receipts from Petitioner and the other two heirs, Renee Lucille Austin and Charles Joseph Miguel, indicating the amount received from this preliminary distribution.

6. Petitioner states the I&A item #2 on Attachment #2 (304.36117 shares AST PIMCO Total Return Bond valued at \$5,559.60) was sold, but does not provide the sale price or whether there was gain or loss on the sale. Need clarification.

7. Petitioner does not provide the disposition of the 13.918 shares Fidelity ADV Dividend Growth FD-CL T valued at \$158.94 (I&A #4 on Attachment #2).

*(Disbursements Schedule line item dated 8-18-11 titled "Fidelity ADV" states "Remove asset not owned by decedent" and indicates disbursement of \$158.94. Need clarification.)*

8. Petitioner states the mobile home was sold, but does not state provide the sale price, whether there was a gain or loss, or include the proceeds from the sale in the Receipts Schedule.

Note that Examiner is unable to confirm whether the Administrator's statutory fee calculation is appropriate based on the foregoing items.

SEE PAGE 3

**NEEDS/PROBLEMS/COMMENTS (Continued):**

9. Petitioner includes the “Note Receivable” valued at \$14,729.30 as Property On Hand, but does not address how this item is being handled or distributed among the heirs. Examiner notes that the estate did receive payments on the note during administration.

Need clarification. If the heirs are to receive undivided interests in the “Note Receivable” the Court may require written consent pursuant to Local Rule 7.12.3.

10. Disbursements Schedule and Notes to Disbursements Schedule reflect various items that the Court may require additional clarification for:

- 11-14-10 – Post Office – Change of address - \$6.99
- 12-9-10 – La Quinta Inn – Hotel - \$133.28
- 3-5-11 – Pack Ship & More – Mail probate papers - \$4.80
- 4-27-11 – Office Depot – Fax acceptance – home sale - \$17.39
- 5-13-11 – Just Answer – Legal advice - \$30.00
- 5-18-11 – Postal Plus – Certified mail - \$20.10
- 5-31-11 – Pack Ship & More – Notary/Overnight mail - \$39.94
- 7-27-11 – Pack Ship & More – Copies/mail final tax returns \$5.06
- 8-10-11 – Pack Ship & More – Overnight mail/copies - \$31.81
- 8-22-11 – Cheryl Miguel – Stamps - \$8.80
- 8-26-11 – Postal Plus – Notary/Certified mail - \$37.65
- 8-26-11 – Charlie Miguel – Notary - \$30.00
- 8-26-11 – Renee Austin – Notary - \$30.00
- 11-2-11 – Pack Ship & More – Overnight/Copies - \$39.10
- 1-7-12 – Juris Documents – Pleading forms - \$40.00
- 1-12-12 – Pack Ship & More – Mail fiduciary returns - \$7.10

11. Need new order in compliance with Local Rule 7.6.1.F. (Some portion of the contents of the order must appear on the page upon which the judge’s signature is affixed.)

Age: 8 years DOB: 4/28/2003	<p style="text-align: center;"><u>Temporary Expires 3/14/12</u></p> <p><b>JOSEPHINA GONZALEZ</b>, maternal grandmother, is Petitioner.</p> <p>Father: <b>RICHARD LONGBOY</b> – <i>personally served on 9/27/11.</i></p> <p>Mother: <b>GRACIE CAMARILLO</b> – <i>court dispensed with notice by minute order dated 9/15/11.</i></p> <p>Paternal grandfather: <i>Not listed</i> Paternal grandmother: <i>Not listed</i> Maternal grandfather: <i>Not listed</i></p> <p><b>Petitioner states</b> the child needs a guardian because her father is incarcerated, her mother is unstable and has not been in the child’s life for two years, and the child has no home. Petitioner states the child’s father wishes that the child live with the Petitioner.</p> <p><b>Court Investigator Dina Calvillo’s Report filed on 10/18/11.</b></p>	NEEDS/PROBLEMS/COMMENTS:
Cont. from 110211, 020112		Continued from 2/1/12. As of 3/5/12 the following issues remain:
Aff.Sub.Wit.		1. Petition does not include the names and addresses of the paternal grandparents or the maternal grandfather.
✓ Verified		2. Need proof of service of the <i>Notice of Hearing</i> and a copy of the <i>Petition or Consent to Appointment of Guardian and Waiver of Notice</i> , or a <i>Declaration of Due Diligence</i> for:
Inventory		a. Paternal grandparents
PTC		b. Maternal grandfather
Not.Cred.		3. <i>UCCJEA</i> form filed on 9/2/2011 does not provide residence information for the last 5 years as required.
✓ Notice of Hrg		Reviewed by: KT
✓ Aff.Mail W/O		Reviewed on: 3/5/12
Aff.Pub.		Updates:
Sp.Ntc.		Recommendation:
Pers.Serv.		File 17 - Longboy
✓ Conf. Screen		
✓ Letters		
✓ Duties/Supp		
Objections		
Video Receipt		
✓ CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
✓ UCCJEA		
Citation		
FTB Notice		

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

Age: 12	NO TEMPORARY – none requested	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order 11-30-11:</b> Examiner Notes provided to Petitioner. Petitioner is directed to cure the defects. The Court continues the matter to 2-1-12. The Court orders that a Court Investigator contact CPS to follow up on the Petitioner’s participation in the programs she was directed to attend during the TDM.</p> <p><b>Minute Order 2-1-12:</b> No appearances. The Court continues the matter to 3-14-12. A copy of the minute order was mailed to Petitioner on 2-3-12.</p> <p><b><u>As of 3-6-12, nothing further has been filed.</u></b></p> <p><b><u>Guardianship cannot go forward without the following mandatory items:</u></b></p> <ol style="list-style-type: none"> <li>1. Need Confidential Guardianship Screening Form (GC-212).</li> <li>2. Need Duties of Guardian (GC-248)</li> <li>3. Need Notice of Hearing.</li> <li>4. Need proof of personal service of Notice of Hearing with a copy of the Petition at least 15 days prior to the hearing per Probate Code §1511 or consent and waiver of notice on <u>Lorenzo D. Leavy (age 12)</u>.</li> <li>5. Need proof of service of Notice of Hearing with a copy of the Petition at least 15 days prior to the hearing per Probate Code §1511 or consent and waiver of notice or declaration of due diligence on: <ul style="list-style-type: none"> <li>- Paternal Grandfather</li> <li>- Paternal Grandmother</li> <li>- Maternal Grandfather</li> <li>- Maternal Grandmother</li> <li>- Tehada Hale (Sibling age 35)</li> <li>- Shaniea Easter (Sibling age 30)</li> <li>- Dewayne Easter (Sibling age 29)</li> <li>- Hosea Leavy (Sibling age 21)</li> <li>- Latifah Leavy (Sibling age 19)</li> <li>- Marquise Leavy (Sibling age 15)</li> <li>- Parent/Guardian of Marquise</li> <li>- Any other siblings age 12 or older, and parent or guardian, if still a minor</li> </ul> </li> </ol>
DOB: 11-20-99	TAMIA M. LEAVY, Sister, is Petitioner.	
Cont. from 113011, 020112	Father: <b>Deceased</b> Mother: <b>Deceased</b>	
Aff.Sub.Wit.	Paternal Grandfather: Not listed	
✓ Verified	Paternal Grandmother: Not listed	
Inventory	Maternal Grandfather: Not listed	
PTC	Maternal Grandmother: Austrila Vines	
Not.Cred.	Siblings: Dewayne Gaster, Tehada Hale (ages not listed)	
Notice of Hrg	<b>Petitioner states</b> she is the only thing close to a mother that he has and requests to let him stay close to home. She loves her brother and has taken care of him his whole life and knows he wants to succeed in life.	
Aff.Mail	UCCJEA indicates Lorenzo has lived with Petitioner since July 2008.	
Aff.Pub.	<b>Court Investigator Samantha Henson filed a report on 11-22-11.</b>	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
✓ CI Report		
✓ Clearances		
Order		
Aff. Posting		
Status Rpt		
✓ UCCJEA		
Citation		
FTB Notice		
Reviewed by: skc		
Reviewed on: 3-6-12		
Updates:		
Recommendation:		
File 18 - Leavy		

Atty Liscano, Lorie (pro per – maternal grandmother/Petitioner)

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

Age: 2 months DOB: 11/05/11	<b><u>TEMPORARY EXPIRES 03/14/12</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>LORIE LISCANO</b> , maternal grandmother, is Petitioner.	<b><u>CONTINUED FROM 02/01/12</u></b> This Petition is for Arturo Vargas only. Petitioner was appointed as Guardian of Jordan and Guage on 12/01/11.
	Father: <b>MARIO VARGAS</b> – <i>personally served 01/27/12</i>	
Cont. from 020112	Mother: <b>MARYANN LISCANO</b> – <i>personally served 02/02/12</i>	
Aff.Sub.Wit.	Paternal grandparents: UNKNOWN – <i>declaration of due diligence filed 02/28/12</i>	
✓ Verified	Maternal grandfather: <b>RUDY LISCANO</b> – <i>personally served 02/27/12; consent &amp; waiver of notice filed 02/28/12</i>	
Inventory	Petitioner states that the mother has a history of drug abuse. Petitioner has cared for all children since birth. Petitioner was appointed as guardian of Jordan and Guage on 12/01/11, however, Arturo was not included in the Petition because he was not born until after the Petition was filed. Petitioner is now seeking guardianship of Arturo also. Petitioner states that he is a newborn and needs to be properly cared for and his mother knows that she is not able to properly care for any of her children.	1. Declaration of Due Diligence filed 02/28/12 states that the Paternal Grandparents are unknown and Petitioner does not know their names. If Diligence is not found, need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Guardianship or Consent and Waiver of Notice</i> for: - Paternal grandparents (unknown)
PTC		
Not.Cred.		
✓ Notice of Hrg		
Aff.Mail	n/a	
Aff.Pub.		
Sp.Ntc.		
✓ Pers.Serv.		
✓ Conf. Screen		
✓ Letters		
✓ Duties/Supp		
Objections		
Video Receipt		
✓ CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
✓ UCCJEA	<b>Court Investigator Julie Negrete's report was filed 02/27/12.</b>	<b>Reviewed by:</b> JF
Citation		<b>Reviewed on:</b> 03/06/12
FTB Notice		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 19 – Halford &amp; Liscano</b>

**Petition to Determine Succession to Real Property**

<b>DOD: 11-5-05</b>	<b>DOUGLAS SMITH</b> , unspecified relationship, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <p style="text-align: center;"><b><u>OFF CALENDAR</u></b></p> <p>Order signed 3-7-12.</p>
	40 days since DOD	
	No other proceedings	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	
<input checked="" type="checkbox"/>	<b>Verified</b>	
<input checked="" type="checkbox"/>	<b>Inventory</b>	
	I&A - \$47,600.00	
	<b>PTC</b>	
	Decedent died intestate	
	<b>Not.Cred.</b>	
N/A	<b>Notice of Hrg</b>	
N/A	<b>Aff.Mail</b>	
	Petitioner requests court determination that decedent's 100% interest in certain real and personal property passes to him pursuant to intestate succession.	
	<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>	
<input checked="" type="checkbox"/>	<b>Order</b>	
	<b>Aff. Posting</b>	
	<b>Status Rpt</b>	
	<b>UCCJEA</b>	
	<b>Citation</b>	
	<b>FTB Notice</b>	
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 3-7-12
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 20 – Smith</b>

Petition for Letters of Administration (Prob. C. 8002, 10450)

DOD: 11/10/11		<p><b>ELIZABETH DYER AND KAREN DAVIS</b>, Decedent's daughters, are Petitioners.</p> <p>Decedent died intestate.</p> <p>All heirs waive bond.</p> <p>Residence – Fresno          Publication – Fresno Business Journal</p> <p><b>Estimated value of estate:</b></p> <table> <tr> <td>Personal property</td> <td>-</td> <td>\$ 10,000.00</td> </tr> <tr> <td>Annual income</td> <td>-</td> <td>228,000.00</td> </tr> <tr> <td>Real property</td> <td>-</td> <td>50,000.00</td> </tr> <tr> <td><b>Total</b></td> <td></td> <td><b>\$288,000.00</b></td> </tr> </table> <p><b>Probate Referee: Rick Smith</b></p>	Personal property	-	\$ 10,000.00	Annual income	-	228,000.00	Real property	-	50,000.00	<b>Total</b>		<b>\$288,000.00</b>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
Personal property	-		\$ 10,000.00												
Annual income	-		228,000.00												
Real property	-		50,000.00												
<b>Total</b>			<b>\$288,000.00</b>												
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														
		Reviewed by: NRN													
		Reviewed on: 3/6/12													
		Updates:													
		Recommendation:													
		File 21 – Anderson													

Petition for Determination of Property Subject to Trust (Probate Code 850 and 17200) Points and Authorities in Support of Petition

	<b>RUTH GAMBRELL</b> , Successor Trustee, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Petitioner states <b>BOBBY MERRILL BIGBY</b> created the <b>BOBBY M. BIGBY LIVING TRUST</b> , dated 11/3/2009.	
<b>Cont. from 030112</b>		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	On 12/6/2010, Bobby Merrill Bigby died.	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Section 1.01 of the Trust provides that the Trustor has assigned and transferred to the Trust all property described in Exhibit "A" to the Trust. Exhibit "A" of the Trust identifies initial trust property and includes among other property the following described property:	
<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		
<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	<p>The following accounts with Bank of America and personal property were titled in the name of Bobby Merrill Bigby as of the date of the Trust and were still held at the date of the death of the Trustor/Settlor, Bobby M. Bigby, without reference to the Trust:</p> <ul style="list-style-type: none"> <li>a. Bank of America Growth Cash Maximizer;</li> <li>b. Bank of America checking account;</li> <li>c. 2000 Toyota</li> <li>d. 1965 Chevrolet Pickup.</li> </ul>	
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice	<p>Petitioner states the Court should confirm that the forgoing property is property of the Trust and trust estate.</p> <p><b>Wherefore, Petitioner prays for an order of this Court:</b></p> <ol style="list-style-type: none"> <li>1. Confirming and determining the foregoing described property and/or accounts is property of the Trust and Trust estate, and should be held, administered and distributed by Petitioner in trust as Trustee, subject to the terms of the Trust.</li> </ol>	

**Reviewed by:** KT  
**Reviewed on:** 3/5/12  
**Updates:**  
**Recommendation:**  
 File 22 - Bigby

Special Further Hearing Re: Clarification and Further Information Re:  
 Conservatorship of the Estate

Age: 49	JOEL D. CARIAGA, Spouse, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
DOB: 4-18-62	On 2-29-12, JOEL D. CARIAGA was appointed Conservator of the Person with medical consent powers and Conservator of the Estate.	
Aff.Sub.Wit.	Subsequent to the hearing of 2-29-12, on 3-5-12, the Court stayed the order of appointment and set this special further hearing for clarification regarding the request for Conservatorship of the Estate.	
Verified		
Inventory		
PTC		
Not.Cred.	The Court requested that the Conservator provide further information, including:	
Notice of Hrg	<ul style="list-style-type: none"> <li>What is the total value of the life insurance policy that Conservator requests access to?</li> </ul>	
Aff.Mail		
Aff.Pub.	<ul style="list-style-type: none"> <li>Is the cash value for the policy a different amount?</li> </ul>	
Sp.Ntc.		
Pers.Serv.	<ul style="list-style-type: none"> <li>What are the terms of the policy regarding disability? For instance, are premiums waived in the event of a disability?</li> </ul>	
Conf. Screen		
Letters		
Duties/Supp	<ul style="list-style-type: none"> <li>What is Conservator's intent regarding access to the policy? Is it Conservator's intent to borrow against the cash value? Is it Conservator's intent to maintain the premiums?</li> </ul>	
Objections		
Video Receipt		
CI Report	Mr. Cariaga's Declaration filed 3-9-12 states that because of his wife's ailment, he doesn't have a job anymore. He intended to cancel <u>his personal life insurance</u> , but his agent advised him that he could borrow against it for his living expenses. However, in order to do so, he needs his spouse's signature. Because his wife cannot sign, he was advised to obtain conservatorship.	
9202		
Order		
Aff. Posting		
✓ Status Rpt		
UCCJEA		
Citation		
FTB Notice	Also during this period of time, he had stopped paying on <u>the conservatee's life insurance</u> . Rather than let this policy lapse, they sent forms to allow the accumulated cash value to cover the payment until he can make the payments again, but again he needed her signature to do this.	
	Mr. Cariaga states he has no intention of withdrawing or borrowing cash from the Conservatee's policy, but he does not want to let it lapse.	
		Reviewed by: skc
		Reviewed on: 3-12-12
		Updates:
		Recommendation:
		File 23 - Cariaga