

(1) First and Final Account and Report of Successor Administrator of Insolvent Estate and (2) Petition for Allowance of Ordinary Commissions and Fees

Age:		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Amended petition filed 2-9-15 is set for hearing on 3-26-15.</p>
DOD:		
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
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<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 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: skc
		Reviewed on: 3-12-15
		Updates:
		Recommendation:
		File 1 - Martin

Petition for (1) Settlement of Account; (2) Approval of Trustee's Fees; and (3) Approval of and Payment of Attorney Fees

	See petition for details.		NEEDS/PROBLEMS/ COMMENTS:
	Cont from 021715		
	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: skc
			Reviewed on: 3-12-15
			Updates:
			Recommendation:
			File 2 - Bailey

3 Madeline I Scheppner (Estate)

Case No. 13CEPR00872

Atty Motsenbocker, Gary L. (for Kenneth W. Price – Administrator – Petitioner)

1) First and Final Account and Report of Administrator; and 2) Petition for its Settlement; 3) for Allowance of Compensation to Administrator and Attorney for Ordinary Services; and 4) for Final Distribution

DOD: 7-23-08	See petition for details.		NEEDS/PROBLEMS/ COMMENTS: Continued from 2-10-15. The following examiner notes remain noted here for reference, but are addressed in Petitioner's Declaration filed 2-10-15: 1. Administrator was granted Limited IAEA without bond on 11-7-13, which does not allow sale of real property without Court approval. The Administrator also did not apply for bond after the sale pursuant to Cal. Rule of Court 7.204. 2. The Court may require clarification or further accounting regarding the management of the real property since 2008. Who has been receiving rents?
Cont from 021015			
	Aff.Sub.Wit.		
✓	Verified		
✓	Inventory		
✓	PTC		
✓	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters	11-7-13	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
✓	FTB Notice		
			Reviewed by: skc Reviewed on: 3-12-15 Updates: Recommendation: File 3 - Scheppner

4A Edith Lillian Mitchell Stevens Rev. Liv. Trust

Case No. 13CEPR00943

Atty LeVan, Nancy (for Petitioner, Dale Stevens)

Atty Standard, Donna (for Robert Stevens)

Petitioner, Dale Stevens' First Partial Accounting

		<p>DALE STEVENS, as the purported, proper, successor Trustee of the Edith Lillian Mitchell Stevens Revocable Trust, is petitioner.</p> <p>Please see petition for details.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. The accounting does not comply with Probate Code §1060 et seq. 2. Need Notice of Hearing. 3. Need proof of service of the Notice of Hearing on all interested parties. 4. Need Order. 	
Cont. from 010515, 012715				
<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"/>
<input type="checkbox"/>	Aff.Mail			<input checked="" type="checkbox"/>
<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 type="checkbox"/>	Order	<input checked="" type="checkbox"/>		
<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: 3/12/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 4A - Stevens</p>				

4A

Atty LeVan, Nancy (for Dale Stevens)
Atty Standard, Donna (for Robert Stevens)

Probate Status Hearing RE: Settlement and First Amended Petition for Instructions and to Determine Entitlement

	<p>Status Report filed on 1/20/15 filed by Donna Standard on behalf of her client ROBERT STEVENS.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: The Sam C. Stevens Trust is not before the court nor is the Edith Lillian Mitchell Stevens' Will before the court. If the parties want to have the court rule on the issues regarding the Sam C. Stevens Trust or the Edith Lillian Mitchell Stevens Will then separate proceedings will need to be commenced regarding those instruments.</p>	
Cont. from 012715			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: KT	
		Reviewed on: 3/12/15	
		Updates:	
		Recommendation:	
		File 4B - Stevens	

Order to Show Cause RE: Failure to Appear and Failure to File the Inventory and Appraisal

DOD: 7/22/2014	MARGARET J. BERLESE was appointed Executor with full IAEA authority and without bond on 10/14/14.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need final inventory and appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties</p>
	Letters issued on 10/15/14.	
Cont. from	Minute order dated 10/14/14 a status hearing for the filing of the inventory and appraisal.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.	Minute Order dated 2/10/15 on the Status Hearing for the filing of the inventory and appraisal issued this Order to Show Cause for failure to appear and failure to file the inventory and appraisal. Minute order states both Margaret Berlese and Ronald Marblestone are ordered to be personally present or appear by court call on 3/17/15. Copy of the minute order was mailed to Ronald Marblestone on 2/10/15.	
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections	Inventory and Appraisal, partial no. 1, filed on 3/5/15 shows a value of \$1,288,895.02.	
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 3/12/15
		Updates:
		Recommendation:
		File 5 - Berlese

6A Rose Rodriguez (CONS/PE)

Case No. 14CEPR00994

Atty Krbechek, Randolf (for Petitioner/son Dennis Rodriguez)
Atty McFarland, Pamela J (for Maxine Rodriguez)
Atty Knudson, David N. (court appointed for Conservatee)

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

		<p>DENNIS RODRIGUEZ, son, is petitioner and requests appointment as conservator of the estate without bond.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
		<p>Please see petition for details.</p>	<p>Court Investigator advised rights on 12/18/14.</p> <p>Voting rights affected need minute order.</p>
<p>Cont. from 011315, 021015</p>			
	Aff.Sub.Wit.	<p>Court Investigator Report filed on 1/7/15.</p>	<p>1. Need Letters</p>
✓	Verified		
	Inventory	<p>Objections to the Appointment of Dennis Rodriguez as Conservator of the Estate filed by Maxine Rodriguez on 1/22/15.</p>	<p>Note: If the petition is granted, status hearings will be set as follows:</p>
	PTC		
	Not.Cred.	<p>Declaration of Randolf Krbechek filed on 1/9/15</p>	<ul style="list-style-type: none"> • Wednesday, July 22, 2015 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. • Wednesday, May 18, 2016 at 9:00 a.m. in Department 303, for the filing of the first account
✓	Notice of Hrg		
✓	Aff.Mail		<p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
	Aff.Pub.	W/	
	Sp.Ntc.		<p>Reviewed by: KT</p>
	Pers.Serv.		
✓	Conf. Screen		<p>Reviewed on: 3/12/15</p>
	Letters	X	
✓	Duties/Supp		<p>Updates:</p>
	Objections		
✓	Video Receipt		<p>Recommendation:</p>
✓	CI Report		
	9202		<p>File 6A - Rodriguez</p>
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	Citation		
	FTB Notice		

6B Rose Rodriguez (CONS/PE)
Atty Krbechek, Randolf (for Dennis Rodriguez)
Atty McFarland, Pamela J (for Petitioner Maxine Rodriguez)
Atty Knudson, David N. (court appointed for Conservatee)

Case No. 14CEPR00994

First Amended Petition for Appointment of Probate Conservator of the Person & Estate

		TEMPORARY OF THE PERSON ONLY EXPIRES 3/17/15	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator advised rights on 12/18/14.</p> <p>Voting rights affected need minute order.</p> <p>1. Capacity Declaration filed on 11/19/14 is incomplete. It is blank at #1 and #2 (name and address of the physician) and #7 is not initialed by the doctor as required indicating Rose Rodriguez lacks the capacity to give informed consent to medical treatment. (Note: the Capacity Declaration, by a different doctor, filed on 10/30/14 is blank on pages 2 and 3.)</p>
		MAXINE RODRIGUEZ , daughter, is petitioner.	
Cont. from 021015, 021015		Please see petition for details.	
	Aff.Sub.Wit.		
✓	Verified	Court Investigator Report filed on 1/7/15.	
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg	Note: If the petition is granted, status hearings will be set as follows:	
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen	<ul style="list-style-type: none"> Wednesday, July 22, 2015 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Wednesday, May 18, 2016 at 9:00 a.m. in Department 303, for the filing of the first account 	
✓	Letters		
✓	Duties/Supp	Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.	
	Objections		
✓	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	Citation		
	FTB Notice		
			Reviewed by: KT
			Reviewed on: 3/12/15
			Updates:
			Recommendation:
			File 6B - Rodriguez

7 Rodolfo Estrada, Jr (CONS/P)
Atty LeVan, Nancy J. (for Petitioner Rodolfo Estrada, Sr.)
Atty Walters, Jennifer (court appointed for conservatee)

Case No. 14CEPR01179

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

		TEMPORARY EXPIRES 3/17/15	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator advised rights on 2/4/15.</p> <ol style="list-style-type: none"> 1. Need Capacity Declaration re: medical consent powers. 2. Court Investigator's Report indicates that the proposed conservatee has two additional children who were not listed in the petition as required and who have not been noticed. Probate Code §1821(b) and 1822 ((b)(2)). Note: it appears that the children that were not listed are minors. California Rules of Court, Rule 7.51 (d) requires that notice to the minor must be sent directly to the minor and a copy of the notice must be sent to person having legal custody of the minor with whom the child lives. Therefore: Need proof of service of the Notice of Hearing on the proposed conservatee's minor children.
		RUDOLFO ESTRADA, SR., father, is petitioner.	
		See petition for details.	
Cont. from 021015		Court Investigator Report filed on 2/4/15	
<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.		
<input checked="" type="checkbox"/>	Pers.Serv.	W/	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input checked="" type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input checked="" type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 3/12/15
			Updates:
			Recommendation:
			File 7 - Estrada

Petition for Instruction to Trustee

		<p>K. MICHAEL SCOTT, nominated sole successor trustee, is petitioner.</p> <p>Please see petition for details.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</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: 3/12/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 8 – Glenn & Scott</p>	

Petition to Determine Existence of Trust, for Appointment of Harold Rick Moore as Trustee, for Imposition of Constructive Trust, to Enforce No Contest Clause, for Damages and for Attorneys' Fees and Costs

Age:			NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED TO 5-14-15</u> Per attorney request
DOD:			
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<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 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:	
		Reviewed on: 3-12-15	
		Updates:	
		Recommendation:	
		File 9 – Moore	

10 Mary Lou Hernandez (CONS/PE)

Case No. 15CEPR00130

Atty Bagdasarian, Gary G. (for Michelle Ann Torres – Granddaughter – Petitioner)

Atty Horton, Lisa (Court appointed for proposed Conservatee)

Atty Fray, Brian H. (for Santos Torres – Daughter – Objector)

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

See petition and objections for details.			<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note: Santos Torres, Daughter, filed an objection and a competing petition that is set for hearing on 4-15-15.</u></p> <p>Court Investigator advised rights on 2-26-15.</p> <p>Voting rights affected – need minute order.</p> <ol style="list-style-type: none"> 1. The objection indicates that the proposed Conservatee is the beneficiary of her deceased son's accounts and retirement. Has the proposed Conservatee or Petitioner taken control of these funds? Need clarification and estimated value for increased bond. 2. Need Capacity Declaration in support of dementia medication, placement powers as requested. 3. Need video receipt.
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
✓	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	Citation		
	FTB Notice		
			Reviewed on: 3-12-15
			Updates:
			Recommendation:
			File 10 - Hernandez

Pro Per Ramirez, Gregory C. (Pro Per Petitioner, son)
 Atty Kruthers, Heather H. (for Public Guardian, Conservator of the Person and Estate)
 Atty Rindlisbacher, Curtis D. (Court-appointed for Conservatee)

Probate Status Hearing RE: Filing of an Amended Petition

	GREGORY C. RAMIREZ , son, filed on 1/12/2015 an Amended Petition for Appointment of Successor Probate Conservator of the Person and Estate, which was set for hearing on 2/17/2015.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Notes:</p> <ul style="list-style-type: none"> Stipulation for Resignation of Fresno County Public Guardian Effective on Appointment of Gregory Ramirez and Silvia M. Torres-Ramirez as Co-Conservators was filed 2/17/2015 and is signed by all necessary parties, except for SYLVIA M. TORRES-RAMIREZ. Order Accepting Resignation of Fresno County Public Guardian Effective on Appointment of Gregory Ramirez and Silvia M. Torres-Ramirez as Co-Conservators was filed 2/19/2015. Mr. Ramirez' Second Amended Petition was filed 3/16/2015. See Page B. 	
Aff.Sub.Wit.			
Verified	Minute Order dated 2/17/2015 states counsel stipulate that the Public Guardian is willing to resign as long as both Gregory Ramirez and his wife will act as Conservators of the person and estate. Upon their appointment, the Public Guardian will resign, with the understanding that any resignation is as a result of the new appointment and not due to removal for cause. The Court dispenses with any further notice to Martha Patrick. Mr. Rindlisbacher will assist in getting an amended petition filed, which the Court orders be set for 3/17/2015. All orders remain in full force and effect.		
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: LEG
			Reviewed on: 3/12/15
			Updates: 3/16/15 (skc)
		Recommendation:	
		File 11A – Patrick	

GREGORY C. RAMIREZ, Son, is Petitioner and requests that he and, **SILVIA M. TORRES-RAMIREZ**, his wife, be appointed as Successor Co-Conservators of the Person and Estate without bond.

Voting rights affected

Capacity Declaration was previously filed in connection with the original conservatorship petition.

Estimated Value of Estate:

Personal property:	\$10,732.11 (per I&A filed 10-22-14 by Public Guardian - cash, personal property)
Public Assistance:	\$14,328.00
Recovery:	<u>\$ 2,506.01</u>
Total:	\$27,566.12

Petitioner states the Conservatee has dementia and requires a conservator. Petitioner requests that no bond be required because all of the conservatee's assets have been sold and proceeds used to provide for her care. Her only remaining estate consists of Social Security payments that pay her share of cost at the care facility. Petitioner also requests that accountings be waived pursuant to Probate Code §2628.

NEEDS/PROBLEMS/COMMENTS:

1. This petition was filed 3-16-15, and was set for hearing the next day, 3-17-15, pursuant to the Court's minute order of 2-17-15. As such, there has not been time for Notice of Hearing with a copy of the petition to be mailed to all interested relatives. The Court may require continuance for proper notice pursuant to Probate Code §1822 and the Court's order signed 2-19-15, which requires that a copy be served on all interested parties.
2. This petition does not request medical consent powers at #1g and dementia powers at #1k, and does not include the required Attachment Requesting Special Orders Regarding Dementia (Form GC-313). If these powers, which were granted to the Public Guardian, are to be granted to the successor conservators, the Court may require further amended petition, or some other form of notice to the interested parties in addition to a copy of this petition, that these powers are being considered.
3. Petitioners state all of the Conservatee's assets have been sold and used for her care, and her only asset remaining is Social Security, which is paid to the care facility. Pursuant to Local Rule 7.15.4, conservatorship of the estate may not be necessary at this point. Otherwise, bond of at least \$27,566.12 (including cost of recovery) may be required pursuant to Cal. Rule of Court 7.207 and Probate Code §2320(c)(4).

Note: The Court will set a status hearing for the filing of the final account of the Public Guardian as appropriate.

Probate Status Hearing Re: Inventory & Appraisal

DOD: 10/3/2013	<p>RYAN MISSAKIAN was appointed as Administrator with full IAEA and without bond on 7/21/14.</p> <p>Letters issued on 7/22/14.</p> <p>I & A partial no. 1 was filed on 9/15/14 showing a value of \$375,000.00</p> <p>I & A partial no. 2 was filed on 3/12/15 showing a value of \$370,000.00</p> <p>Status Report filed on 3/12/15 states Decedent's residential real property has been sold to the Administrator. The Administrator, Ryan Missakian requires a preliminary distribution order to avoid foreclosure.</p> <p>Accordingly, a Petition for Partial Distribution will be filed to address the ongoing issue of foreclosure of the real property.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Final Inventory</p> <p>1. Inventory and Appraisal partial no. 1, filed on 9/15/14, was not signed by the attorney as required.</p> <p>Note: Probate Code §10501(a)(5) required court supervision for sales of property of the estate to the personal representative.</p>
Cont. from 121714		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<p>Reviewed by: KT</p> <p>Reviewed on: 3/12/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 12 - Missakian</p>

Proabte Status Hearing: Inventory and Appraisal

	LORRAINE RENEE ALVAREZ was appointed guardian on 9/8/14 with bond set at \$7,629.00.	NEEDS/PROBLEMS/COMMENTS: 1. Need receipt for Blocked account in the amount of \$32,135.17. Note: This status hearing is for the filing of the inventory and appraisal. The inventory and appraisal was filed on 3/13/15 which would generally take this status hearing off calendar. It was left on calendar because the Amended Order on Petition for Instructions dated 2/13/15 ordered \$32,135.17 to be placed into a blocked account with receipts to be filed within 15 days. As of 3/13/15 the receipt for blocked account has not been filed.
	Bond was filed on 9/26/14 and Letters issued.	
	Minute order dated 9/8/14 set this status hearing for the filing of the inventory and appraisal.	
Cont. from 011215,012715	Amended Order on Petition for Instructions filed 2/13/15 ordered \$32,135.17 to be placed into a blocked account with receipts filed within 15 days. In addition it was ordered that the bond be increased for a total bond of \$27,419.60.	
Aff.Sub.Wit.	Additional bond filed on 3/5/15.	
Verified	Inventory and appraisal filed on 3/13/15 shows the estate valued at \$41,696.90.	
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 3/12/15
		Updates:
		Recommendation:
		File 13 - Alvarez

Probate Status Hearing Re: Terminate the Conservatorship

	<p>ESMERELDA GARZA, mother, was appointed Conservator of the Person on 03/26/1980.</p> <p>On 01/02/14, Court Investigator JoAnn Morris filed a report. According to the report, Conservator, Esmerelda Garza, passed away and as of December 2013, no one had filed a petition to appoint a successor conservator. Delia's brother, Ruben, indicated that he planned to petition to be appointed as successor conservator.</p> <p>In January 2015, the investigator reviewed the file and discovered that no one had petitioned to be appointed as successor conservator and set this status hearing.</p> <p>Notice of Status Hearing filed 01/27/15 set this status hearing re Terminating the Conservatorship based on vacancy of the Conservator. Clerk's certificate of mailing indicates that a copy of the Notice of Status Hearing was mailed to Delia Garza, Mary Garza, Ruben Garza and Krystal Mendoza on 01/27/15.</p> <p>Court Investigator Jo Ann Morris filed a report on 02/13/15. The report states that the current conservator passed away in December of 2012 and no one has filed a petition to be appointed as successor conservator. The conservatee is a client of CVRC. Therefore it is recommended that the conservatorship be terminated.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 02/17/15</u> Minute Order from 02/17/15 states: Delia Garza is also present in court. Ruben Garza requests time to file a petition for appointment.</p> <p>As of 03/12/15, nothing further has been filed.</p>
Cont. from 021715		
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: JF
		Reviewed on: 03/12/15
		Updates:
		Recommendation:
		File 15 – Garza

Notice of Hearing on Termination of Conservatorship

	EUNICE ILENE WILLIAMS , was appointed conservator of the person on 07/03/1986.	NEEDS/PROBLEMS/COMMENTS:
	Letters issued on 10/10/1986.	
Cont. from	Notice of Status Hearing filed 02/06/2015 set this matter for hearing.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input type="checkbox"/> Verified		
<input type="checkbox"/> Inventory	Notice of Status Hearing filed 02/09/2015 set this status hearing re Terminating the Conservatorship based on the Conservator is no longer able to act as conservator due to illness. Clerk's certificate of mailing indicates that a copy of the Notice of Status Hearing was mailed to Eunice Williams, Lance Mahler, and David Gilbertson CVRC case manager on 02/09/2015.	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Court Investigator report filed 02/17/2015.	
<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 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: LV
		Reviewed on: 03/12/2015
		Updates:
		Recommendation:
		File 16 - Mahler

		NEEDS/PROBLEMS/COMMENTS: <p style="text-align: center;">*Confidential*</p>
Cont. from 111814, 010615		
	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: JF
		Reviewed on: 03/12/15
		Updates:
		Recommendation:
		File 17 – Carrillo & Perez

Petition for Visitation

		<p><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>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 or consent and waiver of notice or declaration of due diligence for:</p> <ul style="list-style-type: none"> • Anthony Fisher (Devon's Father) • Orlando Watson (Khamile & Titus Father) • Devon Fisher (Minor) • Paternal Grandparents (Unknown) 	
Cont. from				
	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			
		<p>Reviewed by: LV</p> <p>Reviewed on: 03/13/2015</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 18 – Fisher & Watson</p>		

1) First Account of Guardian of Funds; and 2) Petition Requesting Approval of Accounting

See petition for details.			NEEDS/PROBLEMS/COMMENTS: 1. The petition is only verified by Nicholas Betner. The Court may require verification by Heidi Betner as well. 2. Petitioners did not use the mandatory Judicial Council schedule Summary form GC-400. 3. The Court may require notice of hearing to be served on the minor directly pursuant to Cal. Rule of Court 7.51(d), unless waived pursuant to Probate Code §1460.1. 4. Although the account is blocked pursuant to the receipt filed 12-30-13, it appears that the title of the account is only "Ethan Betner" and the account statements themselves do not indicate that the account is a guardianship estate account. The Court may require the account to be re-titled appropriately.
	Aff.Sub.Wit.		
✓	Verified	X	
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 3-12-15
			Updates:
			Recommendation:
			File 19 – Betner

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

		Temporary Expires 3/17/15	NEEDS/PROBLEMS/COMMENTS:	
		ILDA AGUILAR , maternal grandmother, is petitioner.		
Cont. from 120914, 020315		See petition for details.		
<input type="checkbox"/>	Aff.Sub.Wit.	Court Investigator Report filed on 12/2/14.		
<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.			
<input checked="" type="checkbox"/>	Pers.Serv.			W/
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: KT	
			Reviewed on: 3/12/15	
			Updates:	
			Recommendation:	
			File 20 - Garza	

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

		Temporary Expires 3/17/15	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of service of the Notice of Hearing or Consent and Waiver of Notice on:</p> <p>a. Narvel Boston (paternal grandfather) – unless court dispenses with notice.</p> <p>b. Selestine Campbell (paternal grandmother) - unless court dispenses with notice.</p> <p>2. Proof of service of the Notice of Hearing filed 3/5/15 does not indicate Rosalind Caldwell (maternal grandmother) was served with a copy of the Petition as required.</p>	
		<p>WILLIE MAE JOHNSON, maternal aunt, is petitioner.</p> <p>Please see petition for details.</p> <p>Court Investigator Report filed on 12/19/14.</p>		
Cont. from 010615, 022415				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W/O		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
				Reviewed by: KT
				Reviewed on: 3/12/15
			Updates:	
			Recommendation:	
			File 21 – Campbell	

Pro Per Lopez, Zenisa (Pro Per Petitioner, maternal aunt)

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

		TEMPORARY EXPIRES 1/27/2015; extended to 3/17/2015	NEEDS/PROBLEMS/COMMENTS:
		ZENISA LOPEZ , maternal aunt, is Petitioner.	<p>Continued from 1/27/2015. Minute Order [Judge Petrucelli] states examiner notes handed in open court; Petitioner to cure defect.</p> <p>The following defect from the last hearing remains:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing and 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: <ul style="list-style-type: none"> • Francisco Lopez, maternal grandfather.
Cont. from 012715		Father: UNKNOWN ; Declaration of Due Diligence filed 11/24/2014. Court dispensed with notice on 12/8/2014, unless his name and whereabouts become known.	
<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.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	Clearances		
<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		
<input type="checkbox"/>			
		Mother: JESSICA MARIE FRUTOZ ; consents and waives notice.	
		Paternal grandfather: Not listed Paternal grandmother: Not listed	
		Maternal grandfather: Francisco Lopez Maternal grandmother: Renee Manjarrez; consents and waives notice.	
		~Please see Petition for details~	
		Court Investigator's Report was filed on 1/20/2015.	
			Reviewed by: LEG
			Reviewed on: 3/12/15
			Updates:
			Recommendation:
			File 22 - Frutoz

	See petition for details.		NEEDS/PROBLEMS/ COMMENTS: Continued from 2-10-15 for notice to the minor's siblings. Notice of Hearing filed 3-9-15 shows the siblings were served 3-4-15, which is 13 days prior to the hearing rather than 15 per Probate Code §1511. The following item was previously noted and does not appear to have been addressed: 1. Petitioner served Mary Ann Garcia; however, this person is not identified in the petition. Is Mary Ann Garcia the maternal grandmother?
	Cont from 021015		
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 3-12-15
			Updates:
			Recommendation:
			File 23 - Almanza

24 **Violet Rose Cordova (GUARD/P)**
Atty Rocha, Deborah Rose (pro per Petitioner/maternal aunt)
Atty Rocha, Keith (pro per Petitioner/maternal uncle)

Case No. 15CEPR00015

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

		<p>THERE IS NO TEMPORARY. Temporary was denied.</p> <p>KEITH ROCHA and DEBORAH ROCHA, maternal uncle and aunt, are petitioners.</p> <p>Please see petition for details.</p> <p>Court Investigator Report filed on 3/11/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of personal service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice on: a. Violet Cordova (minor, age 12)</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv. W/		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: KT</p> <p>Reviewed on: 3/12/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 24 - Cordova</p>	

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

DOD: 2-14-07		ISAAC L. CANDLER, relationship not stated, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		40 days since DOD	<u>Need amended petition based on, but not limited to, the following issues:</u>
	Aff.Sub.Wit.	No other proceedings	1. Need clarification: What is Petitioner's relationship to the decedent?
✓	Verified		
	Inventory	I&A: \$150,000.00 (real property located at 2345 South Lily, Fresno, 93706)	2. Petition is blank at #9a(1). Was the decedent survived by a spouse? If spouse deceased, need date of death.
	PTC		
	Not.Cred.	Decedent died intestate	3. Petition is blank at #9a(3). Was the decedent survived by issue of a predeceased child?
	Notice of Hrg		
	Aff.Mail	Petitioner requests ???	4. Petition is blank at #9b. Was the decedent survived by a step or foster child that would have been adopted but for legal barrier?
	Aff.Pub.		
	Sp.Ntc.		5. #11 refers to personal property as well, but there is no personal property included in the I&A. Need clarification.
	Pers.Serv.		
	Conf. Screen		6. Need Attachment 11 for the legal description of real (and personal?) property plus statement of decedent's interest in the property.
	Letters		
	Duties/Supp		7. Need clarification re #13. Is petitioner claiming a 100% interest in the entire estate? Need clarification pursuant to Probate Code §6400.
	Objections		
	Video Receipt		8. Petitioner listed two relatives at #14, but does not state their relationship to the decedent. Need Attachment 14, which should include all relatives, including petitioner, and state their relationship to the decedent.
	CI Report		
	9202		9. Petitioner states at #17 that the decedent's estate was under a guardianship. Need clarification.
	Order		
	Aff. Posting		10. Need amended I&A. I&A is incomplete at the caption and at #3, and the attachment is not attached to the I&A itself.
	Status Rpt		
	UCCJEA		11. Also, need clarification: The I&A was apparently prepared by the Probate Referee for a Ms. Iqunette Lavette Candler. However, this person is not listed at #14. Who is Ms. Iqunette Lavette Candler, and what is her relationship to the decedent?
	Citation		
	FTB Notice		12. Need Notice of Hearing and proof of service of Notice at least 15 days prior to the hearing on all relatives pursuant to Probate Code §13153.
			Reviewed by: skc
			Reviewed on: 3-12-15
			Updates:
			Recommendation:
			File 25 - Candler

		<p>OSCAR BARBA and TRISHA BARBA, successor guardians of the person and estate, are petitioners and request appointment of HECTOR BARBA, maternal uncle, be appointed successor guardian of the person only.</p> <p>Please see petition for details.</p> <p>Court Investigator Report filed on 3/5/15</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			W/
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
				Reviewed by: KT
				Reviewed on: 3/13/15
				Updates:
		Recommendation:		
		File 27 – De La Mora		