



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Guardian Ramirez, Sandra (Pro Per – Maternal Aunt – Guardian)

Guardian Vildosola, Jose (Pro Per – Maternal Uncle – Co-Guardian)

Probate Status Hearing RE: Removal of Jose Vildosola as Co-Guardian

	SANDRA RAMIREZ and JOSE VILDOSOLA , Maternal Aunt and Uncle, were appointed Guardians on 3/30/09.	NEEDS/PROBLEMS/COMMENTS: Note: As of 3/15/16, no written objections have been filed. Note: In the event that Mr. Vildosola is removed as Co-Guardian, Examiner has prepared an Amended Order Appointing Guardian and Letters of Guardianship reflecting Sandra Ramirez as sole Guardian.
	SALVADOR PULIDO SANCHEZ and LUCIA CORTEZ , Parents, filed an Amended Petition for Termination of Guardianship on 8/20/15, which was heard on 10/20/15, 12/8/15, and 2/2/16.	
	On 2/2/16, the Court denied the parents' petition and ordered supervised visitation.	
	Minute Order 2/2/16 reflects that the parties represent to the Court that the Co-Guardians Sandra Ramirez and Jos Vildosola are no longer together. The Court indicates removal of Mr. Vildosola as guardian should occur based on his representation that he only sees the minor once a month. Mr. Vildosola objects to removal and is to file/properly serve written objections no later than 3/7/16.	
	The Court set this status hearing re removal of Jose Vildosola as co-guardian.	
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UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 3/15/16
		Updates:
		Recommendation:
		File 2- Cortez

Order to Show Cause RE: Failure to File the Next Account

DOD:10/7/12	<p>PAUL T. CHAMBERS was appointed Practice Administrator on 10/16/13 pursuant to Probate Code §9764.</p> <p>Bond of \$47,000.00 was filed 3/17/14 pursuant to Probate Code §9764(d); however, may not have been renewed pursuant to Minute Order 3/3/15.</p> <p>The First Account of IOLTA Trust Funds by Court-Appointed Practice Administrator was settled on 2/3/15 and the Court set a status hearing for 2/9/16 for the filing of the next account.</p> <p>On 2/9/16, there were no appearances.</p> <p>Minute Order 2/9/16 states: NO APPEARANCES. The Court issues an Order to Show Cause to David Roberts as to why he should not be sanctioned for his failure to appear today. Mr. Roberts is ordered to be personally present in court or appear via CourtCall on 3/22/16.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Minute order 3/3/15 (status re bond renewal) states: Based on the circumstances, the Court is not inclined to require a bond. The Court notes that no probate is open, and there appears to be no assets in the estate. The request for no bond is granted, subject to change.</p> <p>Note: Requests for Special Notice have been filed by Attorney J. Patrick Sullivan and also by Walter Wentz.</p> <p>1. Need second/final account or current written status report pursuant to Local Rule 7.5.</p>
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FTB Notice		
	<p>Reviewed by: skc</p>	
	<p>Reviewed on: 3/15/16</p>	
	<p>Updates:</p>	
	<p>Recommendation:</p>	
	<p>File 4- St. Louis</p>	

Petition to Approve Waiver of Account, for Final Distribution, and for Allowance of Compensation for All Services Rendered

DOD: 2/7/14		ANTHONY ALCAZAR , Administrator with Full IAEA with bond of \$240,000.00, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need withdrawal of claim by US Bank Trust, NA pursuant to Order Granting Petition for Approval of Settlement entered 3/7/16. 2. Jesse S. Hernandez, Esq., attorney for US Bank Trust, filed a Request for Special Notice on 1/21/15. If the Request is not withdrawn along with the creditor's claim, need notice pursuant to Probate Code §1252. 3. Petitioner states at Paragraph 7 on Page 6 that notice of administration was given to the Franchise Tax Board via facsimile; however, Probate Code §9202(c) requires that notice be mailed as provided in Probate Code §1215. The Court may require continuance for proper notice to the FTB.
		Accounting is waived.	
		I&A: \$240,000.00	
	Aff.Sub.Wit.	POH: \$147,500.00 consisting of real property, vehicle, personal property, and \$7,500 cash from settlement as described below.	
✓	Verified		
✓	Inventory		
✓	PTC		
✓	Not.Cred.		
✓	Notice of Hrg	Petitioner states all creditor's claims were rejected and the time for filing suit expired, except for the claim filed 12/9/14 by secured creditor US Bank Trust, NA. On 1/25/16, claimant filed a petition for approval of a compromise of the claim, whereby the claim will be withdrawn and the estate's 50% interest in certain real property will be distributed to the claimant in exchange for payment of \$7,500 to the estate. When granted, US Bank Trust, NA, will pay the estate and withdraw its claim. (Examiner's Note: The petition was granted 3/7/16.)	
✓	Aff.Mail	w	
	Aff.Pub.		
	Sp.Ntc.		
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	Conf. Screen		
✓	Letters		
	Duties/Supp		
	Objections		
	Video Receipt	Administrator: \$2,000.00 (Petitioner waives \$3,425.00 of the statutory \$5,425.00)	
	CI Report		
✓	9202	Attorney (Statutory): \$4,135 (Attorney waives \$1,290.00 of the statutory \$5,425.00)	
✓	Order		
	Aff. Posting		
	Status Rpt	Costs: \$1,365.00 (filing, publication, certified copies, appraisal)	
	UCCJEA		
	Citation		
	FTB Notice	x Distribution pursuant to intestate succession: Adell Anderson, Jr.: Entire estate consisting of real property, vehicle, personal property	
Reviewed by: skc			
Reviewed on: 3/15/16			
Updates:			
Recommendation:			
File 5- Anderson			

Amended Petition for Determination of Validity of Trust Amendment

Eugene M. Ford DOD: 4-25-93		SUSAN FORD FRANTZICH, Beneficiary, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 2/23/16 (Court Trial RE: Casey S. Rogers' First Account):</u> Parties have settled; Counsel request 30 days to submit a settlement agreement. The Court orders that the two motions for discovery set for 2/24/16 be continued to 3/22/16. (See Page A.) Ms. Frantzich's petition is continued to 3/22/16.
Evelyn I. Ford DOD: 12-23-13			
Cont. from 110614, 111714, 091415, 110215, 120715, 022316		Petitioner states she is the daughter of decedents Eugene M. Ford and Evelyn Irene Ford and is a beneficiary of the Eugene M. and Evelyn I. Ford Family Trust dated 1-7-91. (Exhibit A)	Note: Pages B and C are discovery motions that appear to be filed in connection with this petition.
Aff.Sub.Wit.			
✓	Verified	Petitioner states Casey Scott Rogers has been acting as Successor Trustee since the death of Mrs. Ford on 12-23-13 pursuant to the Ninth Amendment to Declaration of Trust.	
	Inventory		
	PTC	The Fords had three children: Nancy Lee Ford of Cambria, CA, Susan Jean Frantzich of Clovis, CA, and Patricia Elaine Coffman of Sanger, CA. The original trust named Nancy, Susan, and Patricia as successor co-trustees.	
	Not.Cred.		
✓	Notice of Hrg	Petitioner states the trust property includes, <i>inter alia</i> , real property known as the Quail Oaks Ranch. Among other provisions, the trustee had the power to "apportion and allocate assets of the trust estate" at Section 8.08A. The trust also gave the surviving spouse the power to "amend, revoke, or terminate" the Survivor's Trust at Section 2.03(D).	
✓	Aff.Mail		
	Aff.Pub.	<u>SEE ADDITIONAL PAGES</u>	
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
✓	Response		
	Video Receipt		
	CI Report		
	9202		
	Order	x	Reviewed by: skc
	Aff. Posting		Reviewed on: 3/15/16
	Status Rpt		Updates:
	UCCJEA		Recommendation:
	Citation		File 6B – Ford
	FTB Notice		

Page 2**Petitioner states:**

- On 12-1-92, Mr. and Mrs. Ford signed the 1st Amendment, which amended the trust to name A. Douglas Flint, in the alternative Michael S. Pistorosi, as successor trustees, among other changes. (Exhibit B)
- On 4-25-93, Mr. Ford died and Mrs. Ford became the sole trustee.
- On 6-21-96, Mrs. Ford signed the 2nd Amendment, which amended the trust to appoint the Survivor's Trust to her then-living daughters. (Exhibit C)
- On 1-16-03, Mrs. Ford signed the 3rd Amendment, revoking the 1st and 2nd Amendments and amending the trust to name Nancy, Susan and Patricia as successor co-trustees. (Exhibit D)
- On 6-12-03, Mrs. Ford signed the 4th Amendment, revoking the 3rd Amendment and appointing the Survivor's Trust to her then-living daughters. The 4th Amendment also amended the trust to name Robert G. Carter as successor trustee, then Nancy, Susan and Patricia as successor co-trustees. (Exhibit E)
- On 10-24-03, Mrs. Ford signed the 5th Amendment, appointing \$12,500 each to Ronald McKenzie, Joanne Stanion, and Samantha Cole. (Exhibit F)
- On 7-7-09, Mrs. Ford signed the 6th Amendment, revoking all previous amendments and appointing Casey Scott Rogers as successor trustee, then Nancy, Susan and Patricia as successor co-trustees. (Exhibit G)
- On 3-29-12, Mrs. Ford signed "a trust amendment" naming Petitioner Susan Frantzich as successor trustee. (Exhibit H)
- On 5-10-12, Mrs. Ford signed the 8th Amendment, revoking all prior amendments and appointing James M. Bell as successor trustee, then Nancy, Susan and Patricia as successor co-trustees. (Exhibit I)
- On 3-6-13, Mrs. Ford signed a document stating: "Upon my death, my daughter Susan Ford Frantzich will inherit the Quail Oaks Ranch 'barn compound,' and adjacent 40 acres." (Exhibit J)
- On 3-14-13, Mrs. Ford signed the 9th Amendment, purportedly revoking the 1st through 8th Amendments, and purportedly appointing Casey Scott Rogers as successor trustee, with James M. Bell as next successor trustee, then Nancy, Susan and Patricia as successor co-trustees. (Exhibit K)

SEE ADDITIONAL PAGES

Page 3

Petitioner states she has filed a Petition for Probate in this matter to ensure the Court has the power to enforce Mrs. Ford's intent as expressed in Exhibit J whether it is determined to have been expressed as a codicil or a trust instrument.

Petitioner states Mrs. Ford had the power to amend the Survivor's Trust, and frequently exercised that power before her death. She also had the power to allocate the assets of the trust, including the Quail Oaks Ranch property. Mrs. Ford handwrote the document to leave the Quail Oaks Ranch property "barn compound" and adjacent 40 acres to Petitioner. She had her caregiver, Hilda Ceballos, witness the document, showing the gravity and seriousness of her intent to make a change to the disposition of her estate plan. She satisfied the requirements of the trust for amendment by delivering a copy to herself as sole trustee. Petitioner requests that this Court order that the 3-6-13 document is a valid trust amendment.

Petitioner requests that the Court order the following:

1. **Declare the document signed on 6-3-13 is a valid trust amendment;**
2. **For costs herein; and**
3. **For such other orders as the Court may deem proper.**

Response filed 10-8-14 by Casey S. Rogers, Trustee, states the handwritten document does not constitute a valid amendment to the Survivor's Trust. Mr. Rogers believes he is authorized and directed to oppose the petition, as it has been informally raised whether his opposition would constitute a breach of his fiduciary duties (impartiality) to petitioner as a beneficiary.

In light of the conflict issue raised by Petitioner, Mr. Rogers intends to file a separate petition for instructions as to whether he is authorized and empowered to object to and oppose this petition.

Respondent requests this Court order that:

1. **The petition be continued pending the determination of Respondent's anticipated petition for instructions; and**
2. **Such further order be made as this Court may deem proper.**

Note: Respondent's Petition for Instructions was heard 11/17/14. The Court's Order thereon was entered on 2/12/15.

<p>Cont. from 010616, 022416</p>	<p>CASEY S. ROGERS, Trustee and Respondent, moves for an Order from this Court compelling Petitioner Susan Ford Frantzich to provide further verified responses to Respondent's first set of special interrogatories and first set of document requests and to produce documents in response thereto.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 2/23/16 (Court Trial RE: Casey S. Rogers' First Account):</u> Parties have settled; Counsel request 30 days to submit a settlement agreement. The Court orders that the two motions for discovery set for 2/24/16 be continued to 3/22/16.</p>																																											
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<p>FTB Notice</p>	<p>SUSAN FRANTZICH, Beneficiary and Petitioner, filed a Response on 12/22/15. Petitioner states her responses were adequate and complete. Most of the discovery requests for which Respondent seeks supplemental responses either beg the question of the allocation of the subtrusts or require Respondent to provide an opinion on her mother's intent. Others are simply disagreements with the answers provided. See Response for details.</p> <p>Separate Statement of Discovery Responses in Dispute in Reply to Susan Frantzich's Opposition to Motion was filed 12/29/15 by Casey S. Rogers.</p>	<table border="1"> <tr><td>Reviewed by: skc</td></tr> <tr><td>Reviewed on: 3/15/16</td></tr> <tr><td>Updates:</td></tr> <tr><td>Recommendation:</td></tr> <tr><td>File 6C- Ford</td></tr> </table>	Reviewed by: skc	Reviewed on: 3/15/16	Updates:	Recommendation:	File 6C- Ford																																						
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Notice of Motion and Motion to Compel Further Responses to Discovery and Request for Sanctions; Memorandum of Points and Authorities

Cont. from 010616, 022416	<p>CASEY S. ROGERS, Trustee and Respondent, moves for an Order from this Court compelling Petitioner Susan Ford Frantzich to provide further verified responses to Respondent's second set of special interrogatories.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Aff.Sub.Wit.	<p>In addition, Respondent seeks the imposition of monetary sanctions against Petitioner and/or her counsel in the amount of \$1,795.00 for their misuses of the discovery process.</p>	<p>Minute Order 2/23/16 (Court Trial RE: Casey S. Rogers' First Account): Parties have settled; Counsel request 30 days to submit a settlement agreement. The Court orders that the two motions for discovery set for 2/24/16 be continued to 3/22/16.</p>
Verified	<p>Respondent makes this motion on the grounds that Petitioner did not and has not provided full and complete responses to certain discovery requests. Petitioner has continued in her refusal to properly respond to Respondent's written discovery, despite efforts on the part of Respondent's counsel to meet and confer on the matter.</p>	
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Letters	<p>This motion is made pursuant to Probate Code §1000 and CCP §§ 2023.010, 2030.300, and 2031.310.</p>	
Duties/Supp	<p>See also Memorandum of Points and Authorities, attached requests, responses, communications.</p>	
Objections		
Video Receipt		
CI Report		
9202		
Order	<p>SUSAN FRANTZICH, Beneficiary and Petitioner, filed a Response on 12/22/15.</p>	<p>Reviewed by: skc</p>
Aff. Posting	<p>Petitioner states her objections were made in good faith and are well supported by law and requests the Court deny the motion in its entirety. See authority cited in Response.</p>	<p>Reviewed on: 3/15/16</p>
Status Rpt		<p>Updates:</p>
UCCJEA		<p>Recommendation:</p>
Citation		<p>File 6D- Ford</p>
FTB Notice		
	<p>Separate Statement of Discovery Responses in Dispute in Reply to Susan Frantzich's Opposition to Motion was filed 12/29/15 by Casey S. Rogers.</p>	