



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.

1 Deutsch Park and Botanical Gardens Charitable Trust Case No. 0451442

Attorney Gary G. Bagdasarian (for Petitioner Gloria Kosbie, Successor Trustee)

Probate Status Hearing Re: Proof of Bond, Filing of a Supplemental Accounting, and Proof of Asset Transfer

<p>Fred Deutsch DOD: 7/10/1980</p> <hr/> <hr/> <hr/> <p>Cont. from</p> <table border="1" style="width: 100%;"> <tr> <td style="width: 10%;"></td> <td style="width: 80%;">Aff.Sub.Wit.</td> <td style="width: 10%;"></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Verified</td> <td></td> </tr> <tr> <td></td> <td>Inventory</td> <td></td> </tr> <tr> <td></td> <td>PTC</td> <td></td> </tr> <tr> <td></td> <td>Not.Cred.</td> <td></td> </tr> <tr> <td></td> <td>Notice of Hrg</td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Aff.Mail</td> <td></td> </tr> <tr> <td></td> <td>Aff.Pub.</td> <td></td> </tr> <tr> <td></td> <td>Sp.Ntc.</td> <td></td> </tr> <tr> <td></td> <td>Pers.Serv.</td> <td></td> </tr> <tr> <td></td> <td>Conf. Screen</td> <td></td> </tr> <tr> <td></td> <td>Letters</td> <td></td> </tr> <tr> <td></td> <td>Duties/Supp</td> <td></td> </tr> <tr> <td></td> <td>Objections</td> <td></td> </tr> <tr> <td></td> <td>Video Receipt</td> <td></td> </tr> <tr> <td></td> <td>CI Report</td> <td></td> </tr> <tr> <td></td> <td>9202</td> <td></td> </tr> <tr> <td></td> <td>Order</td> <td></td> </tr> <tr> <td></td> <td>Aff. Posting</td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Status Rpt</td> <td></td> </tr> <tr> <td></td> <td>UCCJEA</td> <td></td> </tr> <tr> <td></td> <td>Citation</td> <td></td> </tr> <tr> <td></td> <td>FTB Notice</td> <td></td> </tr> </table>		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>GLORIA KOSBIE, CPA, Successor Trustee of the DEUTSCH PARK AND BOTANICAL GARDENS CHARITABLE TRUST (<i>Deutsch Park Trust</i>), filed a <i>Petition by Successor Trustee for Leave to Resign; for Appointment of Successor Trustee; for Acceptance of Accounting and Discharge of Prior Trustee</i> on 12/2/2015.</p> <p>Minute Order dated 1/19/2016 from the hearing on the petition states [<i>Attorney Jared</i>] Marshall requests waiver of bond; the Court orders bond reduced to \$85,000.00. Status hearing regarding proof of bond, filing of a supplemental accounting, and proof of asset transfer is set on 3/22/2016.</p> <p>Declaration of Jared D. Marshall Re: Status Report filed 3/11/2016 states:</p> <ul style="list-style-type: none"> The present Status Hearing concerns the discharge of the prior Trustee, Gloria Kosbie, appointment of the successor Trustee, Gary L. Pigg, and the transfer of the assets of the Trust; The prior Trustee, Gloria Kosbie, has transferred the balance of the DEUTSCH PARK AND BOTANICAL GARDENS TRUST account to Gary L. Pigg, President and Successor Trustee; Mr. Pigg executed a copy of a <i>Receipt on Distribution</i>, which was forwarded to Ms. Kosbie's attorney, Gary Bagdasarian, on 3/2/2016; Ms. Kosbie has resigned as Successor Trustee, and Mr. Pigg has accepted the appointment; The Successor Trustee obtained an \$85,000.00 fiduciary bond, and proof of bond will be filed within the next 7 days; Mr. Pigg executed Preliminary Change of Ownership Report forwarded to him by Mr. Bagdasarian, and returned it to him on 3/2/2016. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Need proof of \$85,000.00 bond; Need supplemental accounting of the DEUTSCH PARK AND BOTANICAL GARDENS TRUST from Gloria Kosbie, per the <i>by Successor Trustee for Leave to Resign</i>, which states a supplemental accounting reflecting the additional distributions and expenses since 6/30/2015 will be filed to reflect the accurate amount of remaining assets to be transferred to the new Successor Trustee upon the appointment by the Court. Need <i>Receipt on Distribution</i> signed by Gary Pigg. <hr/> <p>Reviewed by: LEG</p> <p>Reviewed on: 3/16/16</p> <hr/> <p>Updates:</p> <p>Recommendation:</p> <p>File 1- Deutsch</p>
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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.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> As of 3/15/16, no written objections have been filed.</p> <p><u>Note:</u> 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.</p>
	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.	
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Not.Cred.	On 2/2/16, the Court denied the parents' petition and ordered supervised visitation.	
Notice of Hrg		
Aff.Mail	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.	
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		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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		Reviewed by: skc
		Reviewed on: 3/15/16
		Updates:
		Recommendation:
		File 4- St. Louis

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

DOD: 2/7/14		<p>ANTHONY ALCAZAR, Administrator with Full IAEA with bond of \$240,000.00, is Petitioner.</p> <p>Accounting is waived.</p> <p>I&A: \$240,000.00 POH: \$147,500.00 consisting of real property, vehicle, personal property, and \$7,500 cash from settlement as described below.</p> <p>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.)</p> <p>Administrator: \$2,000.00 (Petitioner waives \$3,425.00 of the statutory \$5,425.00)</p> <p>Attorney (Statutory): \$4,135 (Attorney waives \$1,290.00 of the statutory \$5,425.00)</p> <p>Costs: \$1,365.00 (filing, publication, certified copies, appraisal)</p> <p>Distribution pursuant to intestate succession: Adell Anderson, Jr.: Entire estate consisting of real property, vehicle, personal property</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Need withdrawal of claim by US Bank Trust, NA pursuant to Order Granting Petition for Approval of Settlement entered 3/7/16. 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. 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. 	
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		<p>Reviewed by: skc</p> <p>Reviewed on: 3/15/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 5- Anderson</p>		

Probate Status Hearing RE: Filing of a Settlement Agreement

	CASEY S. ROGERS , Trustee, filed a Petition for Settlement and Approval of First Account, which was set for trial on 2/23/16.	NEEDS/PROBLEMS/COMMENTS: 1. Need status of settlement.
	SUSAN FORD FRANTZICH , Beneficiary, filed an Amended Petition for Determination of Validity of Trust Amendment, which was not set for trial, but was trailing the trial on the trustee's account. (See Page B.)	
	Minute Order 2/23/16 states: 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 Pages C and D.)	
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		Reviewed by: skc
		Reviewed on: 3/15/16
		Updates:
		Recommendation:
		File 6A- Ford

6B Eugene & Evelyn Ford Family Trust

Case No. 14CEPR00485

Atty Keeler, William J. (for Susan Ford Frantzich – Beneficiary – Petitioner)

Atty Chielpegian, Mark E. (for Casey S. Rogers – Trustee – Respondent)

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:
Evelyn I. Ford DOD: 12-23-13			
Cont. from 110614, 111714, 091415, 110215, 120715, 022316		<p>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)</p> <p>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.</p> <p>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.</p> <p>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).</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. (See Page A.) Ms. Frantzich’s petition is continued to 3/22/16.</p> <p><u>Note:</u> Pages B and C are discovery motions that appear to be filed in connection with this petition.</p>
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<u>SEE ADDITIONAL PAGES</u>			<p>Reviewed by: skc</p> <p>Reviewed on: 3/15/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 6B – Ford</p>

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. Pistoresi, 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

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.

Age: 14 DOB: 6/20/2000	<p>MARIA GUADALUPE VALENCIA, Mother, was appointed Guardian of the Estate with \$12,000.00 to be placed into a blocked account on 01/12/2015.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 02/22/2016: Counsel represents that she was in trial last week and needs additional time. No appearance is necessary at the status hearing if the petition is filed at least two court days prior.</p>
	Letters issued on 01/13/2015.	<p>1. Need First Account 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>
Cont. from 022216	Receipt for Blocked Account filed 07/01/2015 shows \$12,633.55 was deposited into United Security Bank.	
Aff.Sub.Wit.	Minute Order of 01/12/2015 set this Status Hearing for the filing of the First Account.	
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		Reviewed by: LV
		Reviewed on: 03/15/2016
		Updates:
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		File 7- Patino

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR.</u> <u>Order settling First and Final Account filed 03/14/2016.</u></p>
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9A Raymond Pirie (CONS/PE)

Case No. 14CEPR01089

Attorney: Gary G. Bagdasarian (for Conservatee)

Attorney: Heather H. Kruthers (for temporary Conservator Public Guardian)

Attorney: Theresa B. Petty-Jones (for Anna Lisa Young)

Attorney: David Huynh (for Petitioner H.F. Rick Leas)

Petition for Appointment of Probate Conservator

		TEMPORARY (PUBLIC GUARDIAN)	NEEDS/PROBLEMS/COMMENTS:
		EXPIRES 3/22/16.	
		H.F. RICK LEAS , private professional fiduciary, is petitioner.	Notice of Withdrawal of Petition for Appointment of Probate Conservator filed by Petitioner H.F. Rick Leas on 3/14/16. – Note to Attorney: The proper way to dismiss a petition in probate is to file a Request for Dismissal.
Cont. from 022416		Please see petition for details.	
<input type="checkbox"/>	Aff.Sub.Wit.	Court Investigator Report filed on 2/18/16	Court Investigator Advised Rights on 2/17/16.
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		<ol style="list-style-type: none"> 1. Petition request bond not be required. Petitioner is a private professional fiduciary. Private professional fiduciaries are not exempt from the bond requirements. Therefore, bond should be set at \$639,600.00 2. Copy of the Confidential Capacity Declaration filed by the Public Guardian is attached to the Petition. Confidential documents should not be included on documents that are not filed confidentially. 3. Need Video Viewing Receipt. 4. Order is on an outdated form. Need Order on current updated form.
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			Reviewed by: KT
			Reviewed on: 3/16/16
			Updates:
			Recommendation:
			File 9A- Pirie

Attorney: Gary G. Bagdasarian (for Conservatee)

Attorney: Heather H. Kruthers (for temporary Conservator Public Guardian)

Attorney: Theresa B. Petty-Jones (for Anna Lisa Young)

Attorney: David Huynh (for Petitioner H.F. Rick Leas)

Notice of Motion and Motion to Consolidate Actions, Declaration in Support of Motion, and Proposed Order

	<p>H.F. RICK LEAS filed a motion to consolidate the Public Guardian's petition and his competing petition to be appointed as Mr. Pirie's conservator.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>This Motion appears moot based on the Notice of Withdrawal of H.F. Rick Leas Petition for Appointment of Probate Conservator filed on 3/14/16.</p>
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FTB Notice		
		Reviewed by: KT
		Reviewed on: 3/16/16
		Updates:
		Recommendation:
		File 9B- Pirie

10A In Re: Gramenz Family Living Trust Agreement Case No. 15CEPR00398

Attorney: Steven S. Picone, (for Objectors Daniel Caballero & Baldermar Martinez)

Attorney: Lisa Horton (for Petitioner Rande L Gramenz)

Amended First Account and Report of Trustee and Petition for its Settlement

		RANDE L. GRAMENZ , Successor Trustee, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 1/19/16. Minute order states Ms. Horton represents that additional time is needed to work out terms of settlement.</p> <p>Reviewed by: KT</p> <p>Reviewed on: 3/16/16</p> <p>Updates:</p> <p>Recommendation: File 10A - Gramenz</p>
		Petitioner states settlor, Opal E. Gramenz, died on 12/28/12.	
Cont. from 090115, 101315, 011916		Account period: 12/29/12 – 6/30/15	
	Aff.Sub.Wit.		
✓	Verified	Accounting - \$1,575,344.83	
	Inventory	Beginning POH - \$1,432,128.43	
	PTC	Ending POH - \$1,334,752.81	
	Not.Cred.	Petition states pursuant to Article V section 1 of the trust he has paid his attorney \$5,000.00. Pursuant to Probate Code §15681 he is entitled to reasonable compensation from the Trust. Trust funds totaling \$14,850.00 have been used to pay Trustee's reasonable compensation for his services. This figure was derived from 1% of the total sale price (\$1,485,000) of the duplex.	
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen	Petitioner states the decedent has a bank account at Chase with Kenneth Caballero for the purpose of having someone available to sign checks. Kenneth Caballero was a joint owner but never signed a check, deposited or withdrew funds from the account while the Decedent was alive. All of the funds in the account on Decedent's date of death were hers. After Decedent's death, Kenneth Caballero used some of the funds to pay for funeral expenses, but kept the remaining funds. Trustee demanded the funds so that they could be deposited into the trust account but Kenneth Caballero refused. Since Kenneth Caballero kept those funds, then in the sum of those funds (\$59,494.49, after the payment of funeral expenses) will be counted as a preliminary distribution and taken from Kenneth Caballero's distributive share.	
	Letters		
	Duties/Supp		
✓	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice	Petitioner prays that the Trustee's first account and report be settled, allowed and approved as filed.	

10A In Re: Gramenz Family Living Trust Agreement Case No. 15CEPR00398

Objections to Amended First Account and Report filed by Daniel Caballero and Baldemar Martinez on 8/31/15. Objectors object to the Accounting with respect to Petitioner Trustee's assertion that the joint checking account titled in the name of Kenneth Caballero and Opal Gramenz was a Trust asset and that Kenneth Caballero's beneficial interest in the Trust should be reduced by the amounts left in the joint account at the date of Opal Gramenz's death.

Petitioner's assertion that the funds in the Chase Bank joint account are trust assets and should be counted against Kenneth Caballero's share is flatly wrong as a matter of law. As such the accounting should be revised.

Probate Code §5302 (a) establishes in pertinent part that:

"Sums remaining on deposit at the death of a party to a joint account belong to the surviving party or parties as against the estate of the decedent unless there is clear and convincing evidence of a different intent. . ."

Petitioner has not alleged, let alone proven, that Opal Gramenz and Kenneth Caballero intended for the money held in the Chase joint checking account to be distributed in a different manner other than that provided for by law.

Wherefore, Objectors pray as follows:

1. That the Petition to Approve the Amended Account be denied;
2. That Rande L. Gramenz be ordered to file and serve a code compliant amended accounting of the Trust within 45 days of issuance of the order;
3. For costs, and for such other and further relief as the Court deems just and proper.

10B In Re: Gramenz Family Living Trust Agreement Case No. 15CEPR00398

Attorney: Steven S. Picone, (for Objectors Daniel Caballero & Baldermar Martinez)

Attorney: Lisa Horton (for Petitioner Rande L Gramenz)

Probate Status Hearing: Resolution

	RANDE L. GRAMENZ , Successor Trustee, filed an Amended First and Final Account and Report of Trustee.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 1/19/16. Minute order states Ms. Horton represents that additional time is needed to work out terms of settlement.</p> <p>1. Need 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>
	Daniel Caballero and Baldemar Martinez filed objections to the accounting.	
	Minute order dated 10/13/15 set this status hearing.	
Cont. from 011916		
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: 3/16/16
		Updates:
		Recommendation:
		File 10B- Gramenz

12A Benny Markarian (Estate)

Case No. 15CEPR00668

Attorney Harris, Richard A. (for Pamela Milam – Petitioner – Daughter)

Attorney Nahigian, Eliot (for Ronald Markarian - Son)

Petition for Probate of Will and for Letters Testamentary with IAEA

DOD: 05/15/2015	PAMELA MILAM , daughter/named executor without bond is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		<u>Continued to 05/03/2016 per Stipulation and Order filed 03/15/2016.</u>
Cont. from 081815, 092915, 120815	Petitioner is a resident of Miramar Beach, Florida.	Page 12B is the Status Hearing for the filing of a Will Contest/Competing Petition.
<input type="checkbox"/> Aff.Sub.Wit.	Full IAEA – o.k.	
<input checked="" type="checkbox"/> Verified	Will dated: 02/20/2008	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC	Residence: Fresno	
<input type="checkbox"/> Not.Cred.	Publication: The Business Journal	
<input checked="" type="checkbox"/> Notice of Hrg	Estimated Value of the Estate:	
<input checked="" type="checkbox"/> Aff.Mail w/	Personal property - \$129,300.00	
<input checked="" type="checkbox"/> Aff.Pub.	Real Property - \$160,000.00	
	Total - \$289,300.00	
<input type="checkbox"/> Sp.Ntc.	Probate Referee: Steven Diebert	Note: If the petition is granted status hearings will be set as follows:
<input type="checkbox"/> Pers.Serv.		• Tuesday, 04/19/2016 at 9:00a.m. in Dept. 303 for the filing of the Bond if required and
<input type="checkbox"/> Conf. Screen		• Tuesday, 08/23/2016 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and
<input checked="" type="checkbox"/> Letters		• Tuesday, 05/23/2017 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution.
<input checked="" type="checkbox"/> Duties/Supp		Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
<input type="checkbox"/> Objections		Reviewed by: LV
<input type="checkbox"/> Video Receipt		Reviewed on: 03/16/2016
<input type="checkbox"/> CI Report		Updates:
<input type="checkbox"/> 9202		Recommendation:
<input checked="" type="checkbox"/> Order		File 12A – Markarian
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		

12B Benny Markarian (Estate) Case No. 15CEPR00668

Attorney Harris, Richard A. (for Pamela Milam – Petitioner – Daughter)

Attorney Nahigian, Eliot (for Ronald Markarian - Son)

Probate Status Hearing RE: Filing of a Will Contest/Competing Petition

	PAMELA MILAM, daughter, filed a Petition for Probate of Will and for Letters Testamentary with IAEA on 08/18/2015.	NEEDS/PROBLEMS/COMMENTS: <u>Continued to 05/03/2016 per Stipulation and Order filed 03/15/2016.</u> As of 12/02/2015 no Will Contest/Competing Petition have been filed.
Cont. from 120815	Minute Order of 09/29/2015 set this Status Hearing for the filing of a Will Contest/Competing Petition.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 03/16/2016
		Updates:
		Recommendation:
		File 12B – Markarian

12B

Petitioner Hickingbottom, Sarah (pro per – paternal aunt/Petitioner)

Petition for Appointment of Guardian of the Person

		See petition for details.	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p><u>Minute Order 2/9/16:</u> Continued for service as to Peter Villarrial, Sr., and Richard Houston.</p> <p>As of 3/15/16, nothing further has been filed. The following issue remains noted:</p> <ol style="list-style-type: none"> 1. Need proof of service of Notice of Hearing with a copy of the <u>Petition or Consent & Waiver of Notice or Declaration of Due Diligence</u> for: - Richard Houston (Maternal grandfather) 2. Notice of Heraing filed 10/2/15 does not reflect that Peter Villarrial, Sr. (Paternal Grandfather) was served with a copy of the petition along with the notice. 	
Cont. from 100515, 020916				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			w/o
	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 by: JF/skc		
		Reviewed on: 3/15/16		
		Updates:		
		Recommendation:		
		File 13 – Villarrial		

16 Mya Licon (GUARD/P) Case No. 15CEPR01014

Petitioner Abarca, Michelle Sally (Pro Per – Maternal Aunt)

Petition for Appointment of Guardian of the Person

Age: 8	<u>TEMPORARY EXPIRES 03/22/2016</u>	NEEDS/PROBLEMS/COMMENTS:
	MICHELLE SALLY ABARCA , maternal aunt, is petitioner.	Minute Order of 02/09/2016: Examiner notes and clinic information provided in open Court.
Cont. from 121515, 020916	<u>Please see petition for details</u>	As of this Examiner's review the following issues remain:
<input type="checkbox"/> Aff.Sub.Wit.		1. Need Notice of Hearing.
<input checked="" type="checkbox"/> Verified		2. Need proof of personal 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: <ul style="list-style-type: none"> • Victor Licon (Father) – Unless the Court dispenses with notice
<input type="checkbox"/> Inventory		Note: Declaration of Due Diligence filed 10/13/2015 states the father moved to Chicago, Illinois.
<input type="checkbox"/> PTC		3. 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: <ul style="list-style-type: none"> • Paternal Grandfather (Unknown) • Maternal Grandfather (Unknown) • Oralia Abarca (Maternal Grandmother)
<input type="checkbox"/> Not.Cred.		4. UCCJEA is incomplete as it does not provide the period of time the minor child resided at each address provided for the past five years.
<input type="checkbox"/> Notice of Hrg	x	
<input type="checkbox"/> Aff.Mail	x	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	x	
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		Reviewed by: LV
<input type="checkbox"/> Status Rpt		Reviewed on: 03/15/2016
<input checked="" type="checkbox"/> UCCJEA		Updates:
<input type="checkbox"/> Citation		Recommendation:
<input type="checkbox"/> FTB Notice		File 16 - Licon

Petition for Appointment of Guardian of the Person (Initial)

		NO TEMPORARY	NEEDS/PROBLEMS/COMMENTS:
		Temporary petition dismissed due to no appearances at 2/4/2016 hearing	
		ELAINE POOL , sister, is petitioner	<p>Note: UCCJEA indicates that minor is living with father and she has been since 2010.</p> <ol style="list-style-type: none"> Need proof of service 15 days prior to the hearing of the <i>Notice of Hearing</i> with a copy of the petition <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence for: <ol style="list-style-type: none"> Johnny Martinez (maternal grandfather) Petition lists Darren Pool as a brother to Minor. If sibling is 12 years or older, need proof of service 15 days prior to the hearing of the <i>Notice of Hearing</i> with a copy of the petition <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence for: <ol style="list-style-type: none"> Darren Pool (brother) <i>Notice of Hearing</i> filed 2/4/2016 lists hearing date of 2/4/2016 (temporary hearing), but also has an additional <i>Notice of Hearing</i> attached behind it listing the hearing date of 3/22/2016 (general hearing). Court may require corrected notice.
Cont. from		See petition for details.	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
	Aff.Mail	x	
✓	Aff.Pub.	w/	
	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: SEF
			Reviewed on: 3/16/2016
			Updates:
			Recommendation:
			File 20- Pool

Spousal or Domestic Partner Property Petition

DOD: 1/1/2010		<p>JADINE DUFF, surviving spouse, is petitioner.</p> <p>No other proceedings</p> <p>Decedent died intestate</p> <p>Petitioner states she and decedent were married 8/20/1966. They purchased their home in 1982 and took title in their joint names as community property. They resided in their home until decedent's death on 1/1/2010.</p> <p>All of the property in the petition was paid for using community funds.</p> <p>Petitioner requests court confirmation that ½ interest in real property belongs to her and that ½ interest passes to her.</p>	NEEDS/PROBLEMS/COMMENTS:				
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 type="checkbox"/>	Pers.Serv.						
<input type="checkbox"/>	Conf. Screen						
<input type="checkbox"/>	Letters						
<input type="checkbox"/>	Duties/Supp						
<input type="checkbox"/>	Objections						
<input type="checkbox"/>	Video Receipt						
<input type="checkbox"/>	CI Report						
<input type="checkbox"/>	9202						
<input checked="" type="checkbox"/>	Order						
<input type="checkbox"/>	Aff. Posting						
<input type="checkbox"/>	Status Rpt						
<input type="checkbox"/>	UCCJEA						
<input type="checkbox"/>	Citation						
<input type="checkbox"/>	FTB Notice						
		<table border="1"> <tr> <td>Reviewed by: SEF</td> </tr> <tr> <td>Reviewed on: 3/16/2016</td> </tr> <tr> <td>Updates:</td> </tr> <tr> <td>Recommendation: SUBMITTED</td> </tr> <tr> <td>File 21- Duff</td> </tr> </table>	Reviewed by: SEF	Reviewed on: 3/16/2016	Updates:	Recommendation: SUBMITTED	File 21- Duff
Reviewed by: SEF							
Reviewed on: 3/16/2016							
Updates:							
Recommendation: SUBMITTED							
File 21- Duff							

Petition for Letters of Administration. Authorization to Administer Under the Independent Administration of Estates Act

DOD: 12/5/2015	KENNY H. SEELY , son, is petitioner and requests Fresno County Public Administrator be appointed as administrator without bond.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need proof of publication. 2. Petitioner nominates the Fresno County Public Administrator as Administrator of the estate. There is nothing on file in the case that shows the Public Administrator consents to the appointment. 3. Need <i>Letters</i>. <p>Note: If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> • Tuesday, August 23, 2016 for filing Inventory and Appraisal • Tuesday, May 23, 2017 for filing the first account or petition for final distribution
Cont. from	Petitioner states decedent had filed for dissolution of his marriage prior to his death (15CEFL00512) and judgment was signed on 12/11/2015. Petitioner believes it is best that administration of decedent's estate be handled by a non-interested third party.	
Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
Inventory		
PTC		
Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Full IAEA – <i>need</i>	
<input checked="" type="checkbox"/> Aff.Mail	w/ Decedent died intestate	
Aff.Pub.	Residence: Sanger, CA Publication: <i>need</i>	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Estimated value of Estate:	
Letters	Personal property \$ 70,000.00	
Duties/Supp	Annual gross income: \$ 0.00	
Objections	Real property: \$ 100,000.00	
Video Receipt	Total: \$ 170,000.00	
CI Report	Probate Referee: Steven Diebert	
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
Reviewed by: SEF		
Reviewed on: 3/16/2016		
Updates:		
Recommendation:		
File 22- Seely		

Petitioner Salazar, Alfonsa Angelica (Pro Per – Mother – Petitioner)

Petitioner Salazar, Diana Angelica (Pro Per – Sister – Petitioner)

Petition for Appointment of Probate Conservator

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator advised rights on 3/9/16</p> <p>Voting rights affected, need minute order.</p> <ol style="list-style-type: none"> 1. Need Capacity Declaration in support of the request for medical consent powers. 2. Need Video Receipt from both petitioners per Local Rule 7.15.8.A. 	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			W
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			X
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 3/15/16	
			Updates:	
			Recommendation:	
			File 23- Salazar	

Petition for Appointment of Temporary Guardian of the Person

	See petition for details.	NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 2. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Beverly Reese (Guardian) - Kaylie Humphrey (Minor) - Shellar Jackson (Mother) - Unknown Father
		Reviewed by: skc
		Reviewed on: 3/16/16
		Updates:
		Recommendation:
		File 24- Humphrey

	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	X
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	X
✓	Conf. Screen	
✓	Letters	
✓	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
✓	Order	
	Aff. Posting	
	Status Rpt	
✓	UCCJEA	
	Citation	
	FTB Notice	

Petition for Appointment of Temporary Guardian of the Person

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) <u>or</u> consent and waiver of notice on: - Carol Secoy (Mother) 	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 3/16/16	
			Updates:	
			Recommendation:	
			File 25- Secoy	

Petition for Appointment of Temporary Conservator of the Person

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service of Notice of Hearing with a copy of the petition at least five court days prior to the hearing per Probate Code §2250(e) on Proposed Conservatee Bessie Lee Woods Grant. 3. Need proof of service of Notice of Hearing with a copy of the petition at least five court days prior to the hearing per Probate Code §2250(e) on all relatives listed at #11: <ul style="list-style-type: none"> - Sandra Fusion (Daughter) - Winifred Parks (Daughter) - Latrisha Fuston (relationship not provided) 	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 3/16/16	
			Updates:	
			Recommendation:	
			File 26- Grant	