

Pro Per Gallegos-Bates, Mary (Pro Per Petitioner, Administrator)

(1) First and Final Account and (2) Petition for Final Distribution

<b>DOD: 4/15/2005</b>	<b>MARY GALLEGOS-BATES</b> , sister and Administrator appointed <b>without IAEA Authority</b> and without bond on 8/2/2005, is Petitioner. <i>Letters</i> issued on <b>8/11/2005</b> .	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>Page 1B</b> is the status hearing for the Public Administrator's Final Account.
		<b>Continued from 2/24/2015.</b>
<b>Cont. from 081114 082614, 102114, 012015, 022415</b>	<b>Account period: Not stated</b>	<b>Note for background:</b> Minute Order dated 1/20/2015 states the Court directs the Public Administrator to recover the <b>\$7,090.00</b> that was paid from the escrow improperly to Attorney Patricia Carrillo. Ms. Carrillo's appearance is not required on 2/24/2015 if the aforementioned issue is resolved.
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Accounting - <b>Not stated</b>	<p><b>Note:</b> Declaration of Mary Gallegos-Bates Regarding Attorney's Fees filed 10/16/2014 states:</p> <ul style="list-style-type: none"> <li>To the best of her recollection, in 2006 she paid attorney Patricia Carrillo the sum of <b>~\$800.00</b> to cover Court costs that she advanced;</li> <li>In addition to paying Ms. Carrillo for the Court costs, Ms. Carrillo told her and her now deceased parents that they would have to get a loan to cover her <b>~\$7,000.00</b> in attorney's fees for handling the probate;</li> <li>Attorney Carrillo arranged for a loan and was paid the sum of <b>\$7,090.00</b> from the escrow (copy of the escrow statement attached.) <b>~Please see additional page~</b></li> </ul>
<input checked="" type="checkbox"/> <b>Verified</b>	Beginning POH - <b>\$200,000.00</b>	
<input checked="" type="checkbox"/> <b>Inventory</b>	Ending POH - <b>\$0.00</b>	
<input type="checkbox"/> <b>PTC</b>	Administrator - <b>Not requested</b>	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	Attorney - <b>\$7,000.00</b>	
<input type="checkbox"/> <b>Notice of Hrg</b>	(statutory; <b>paid</b> to Attorney Patricia Carrillo on 4/27/2007 without Court authorization;)	
<input type="checkbox"/> <b>Aff.Mail</b>	<b>Petitioner states:</b>	
<input type="checkbox"/> <b>Aff.Pub.</b>	<ul style="list-style-type: none"> <li>The sole asset of the estate, the Decedent's residence, was distributed to the beneficiaries of the estate, the Decedent's mother and father, <b>VIRGINIA GALLEGOS [DOD 2010]</b> and <b>THEODORE GALLEGOS [DOD 2009]</b>;</li> <li>The Decedent's parents purchased the residence in 2000 and the Decedent and his brother, <b>ROBERT B. GALLEGOS</b>, lived with them;</li> <li>The Decedent's name was on the title as joint tenant with his parents;</li> <li>The Decedent took out 2 subprime loans on the property, and in order to do so, he had to take his parents' names off the property and put the property in his name; when one subprime loan would become due, he would take out another one, and so on;</li> </ul>	
<input type="checkbox"/> <b>Sp.Ntc.</b>	<b>~Please see additional page~</b>	
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
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<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input checked="" type="checkbox"/> <b>9202</b>		
<input type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>	N / A	
		<b>Reviewed by:</b> LEG
		<b>Reviewed on:</b> 3/20/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 1A – Gallegos</b>

Petitioner states, continued:

- The subprime loan payments increased, and Decedent and his parents and brother, **ROBERT B. GALLEGOS**, attempted to make the payments but it became very difficult for them to do so;
- After Decedent's death in 2005, the payments fell behind and the only way to save the house was to get a refinance modification and reduce the monthly payment amount; the estate beneficiaries, Decedent's parents (Virginia and Theodor Gallegos) continued to live in the residence;
- It was also necessary to refinance the property in order to pay the creditor's claims filed in the estate and to pay Petitioner's attorney at the time, **PATRICIA CARRILLO**, her statutory fees; there was no other cash to do so;
- Decedent's parents were the two beneficiaries of his estate, but they did not qualify for the loan because they were both living on Social Security benefits only;
- Attorney Carrillo would not continue handling the estate unless we deposited **\$7,000.00** for attorney's fees in her trust account; she wanted to get paid and said she would introduce us to someone who could help get a loan despite the low income;
- Attorney Carrillo sent us to a man named **PAUL WILLINGHAM**, who said he could get their brother, Robert, qualified for a loan even though his sole source of income was Social Security Disability, but in order to refinance the loan, he had to be on title to the home;
- In 2007, at the close of escrow, the residence was deeded to Robert Gallegos, Decedent's brother (*copy of escrow statement attached as Exhibit A*);
- As can be seen from the escrow statement, the creditor's claims were paid from the escrow, and the attorney's fees were paid out of the escrow;
- The balance of the funds in the approximate amount of **\$13,000.00** was given to Robert Gallegos [*escrow statement shows \$13,629.12 was the borrower's refund*];
- Petitioner and Robert were under the impression that because the estate had been distributed, that it was now closed;
- The estate had been distributed to the Decedent's mother and father (Virginia and Theodor Gallegos) because after the close of escrow, Robert added his them back on title to the home as joint tenants as his parents requested;
- Decedent's parents Virginia and Theodor Gallegos wanted Robert on the title as a joint tenant in case something happened to them because Robert is disabled and they wanted to make sure he would always have a place to live;
- Robert gave the **\$13,000.00** "overage" from the escrow to his parents Virginia and Theodor Gallegos who paid off their bills;
- It was not until December 2013 that the petitioner learned that the probate had never been closed and the Court set a status hearing to complete the probate;
- Title to the Decedent's property is now held in the name of Robert Gallegos, Virginia and Theodor Gallegos, as joint tenants (*copy of Deed attached as Exhibit B*).

**Distribution pursuant to intestate succession (§ 6402(b)) is to:** Virginia Gallegos and Theodor Gallegos (Decedent's parents) as to the entire interest in Decedent's real property.

~Please see additional page~

**NEEDS/PROBLEMS/COMMENTS RE: Petitioner's First and Final Account:**

**The following issues from the last hearing remain:**

**Note:** Petitioner was granted **no** independent authority to administer the estate, hence court supervision has been required to administer this estate pursuant to Probate Code § 10401, such that judicial order, authorization, approval, confirmation or instructions are required for many actions during administration, including most importantly the final distribution of property pursuant to Probate Code § 10501 (a)(4), which the *Petition* states has already been done. Based upon Court records, it appears court supervision has never been sought by Attorney Patricia Carrillo for the Administrator for any actions taken during this estate administration in violation of Probate Code §§ 9610 et seq., and §§ 9650 et seq., which require court supervision of specific administrative transactions and actions taken where no IAEA authority has been granted.

1. Attorney Patricia Carrillo arranged for a loan and was paid without Court authorization the sum of **\$7,090.00** from the escrow related to the loan the Administrator was made to take out on the real property for payment of her attorney fees and for payment of **\$8,829.28** in creditors' claims.
2. *Order on Court Fee Waiver* filed 7/7/2014 grants Petitioner's fee waiver. Filing fees are considered costs of administration and must be paid prior to distribution of assets and property from an estate. The estate property has been distributed by Petitioner; therefore a **\$435.00** filing fee to the Court is due from Petitioner prior to issue and processing of a final order for closing this estate.
3. Need *Notice of Hearing of the First and Final Account and Petition for Final Distribution*, and proof of mailed service of 15 days' notice prior to hearing pursuant to Probate Code §§ 1220, 11000 and 11601 for the following person:
  - **ROBERT B. GALLEGOS**, brother.
4. *Final Inventory and Appraisal* filed on 9/28/2005 is incomplete at Item 5 re: property tax certificate, as required by Probate Code § 8800(d). Need statement regarding Property Tax Certificate. (Revenue and Tax Code § 480.)

**Note Re Creditors' Claims:** Paragraph 9 of the *Petition* states: "All creditor's claims have been paid, and Withdrawals of Creditor's Claims have been filed with the Court." Court records show no withdrawals of creditors' claims have been filed with the Court, nor have proofs of satisfaction of the claims been filed. Exhibit A containing a copy of the Chicago Title escrow statement from the loan funds obtained against the estate real property appears to demonstrate payment of the following creditors' claims filed in this proceeding:

- **\$2,444.54** filed by **CAPITAL ONE** on 9/27/2005;
- **\$5,165.74** filed by **HOUSEHOLD FINANCE CORP.** on 9/6/2005;
- **\$1,219.00** filed by **CITIBANK USA** on 8/9/2005.

**~Please see additional page~**

NEEDS/PROBLEMS/COMMENTS, continued:

**Note Re Administration and Distribution of the Estate Property:** Paragraph 10 of the *Petition* states Petitioner took the following action without court supervision: "The sole asset of the estate, the Decedent's residence, was distributed to the beneficiaries of the estate, the Decedent's mother and father, **VIRGINIA GALLEGOS [DOD 2010]** and **THEODORE GALLEGOS [DOD 2009]**." Probate Code § 10501 lists the actions that must be brought before the Court even when the personal representative has been granted full IAEA authority, or limited IAEA authority, some of which are as follows:

- 10501(a)(2) – Allowance of compensation to the attorney for the personal representative [please refer to **Note Re Payment of Attorney Fees**, below];
- 10501(a)(3) – Settlement of accounts [pending];
- 10501(a)(4) – Final distributions and discharge [pending];
- 10501(b)(4) – Borrowing money with the loan secured by an encumbrance upon real property.

In violation of the Probate Code provisions, the Petitioner has proceeded without any IAEA authority and without court supervision regarding each of the above-noted actions. However, in light of the complicated background of this matter, it appears the Court may take into account the totality of circumstances of this case, including Petitioner's previous representation by Attorney Carrillo, when making a determination regarding the acceptability of the Petitioner's *First and Final Account and Petition for Final Distribution*.

**Note Re Payment of Attorney Fees:** Based on the pleadings, Attorney Patricia Carrillo has been **paid a minimum of \$7,690.00 in fees and costs** from the estate and/or the Petitioner. The following case history and information is provided for the Court's reference regarding this payment of attorney fees:

- **Letters issued to the Petitioner for this estate on 8/11/2005**, while she was represented by Attorney Carrillo. The complete lack of the Petitioner's IAEA authority, which IAEA authority is typically requested and granted as standard practice in probate proceedings before this Court, was the result of the initiation of these proceedings by Attorney Carrillo. Petitioner in her proceeding as a self-represented party likely was unaware of the lack of her authority as Administrator. The lack of communication between Petitioner and Attorney Carrillo was a burden upon Attorney Carrillo to timely rectify.
- **Status Report filed 2/14/2014 by Attorney Carrillo**, which was filed in response to the Court setting a status hearing on **2/21/2014** for failure to file a first account or petition for final distribution is quoted as follows:  
"The statutory attorney fees have been paid on or about 4/27/2011 [sic]. A *First and Final Account and Petition for Final Distribution* (the 'Final Petition for Distribution') has not been filed in this case. All associated costs or expenses incurred in the administration of the estate have been paid or reimbursed to the attorney for the Administrator, Patricia S. Carrillo (the 'Attorney')."
- **Order Granting Attorney's Motion to be Relieved as Counsel filed 4/2/2014** granted Attorney Carrillo's request to withdraw from representation of the Petitioner. **Minute Order dated 4/2/2014 states:** Ms. Carrillo is directed to provide Ms. Gallegos-Bates any documents she has. Matter continued to 5/7/2014 for Ms. Gallegos-Bates to hire new counsel.

~Please see additional page~

NEEDS/PROBLEMS/COMMENTS, continued:

- **Copy of Chicago Title escrow statement dated 4/27/2007**, following Attorney Carrillo's release as attorney of record, shows that the following payments pertinent to the estate administration and closing were made from the loan funds obtained against the estate real property:
  - Broker compensation and Origination fee of **\$1,952.00** to **PAUL D. WILLINGHAM DBA iFINANCIAL**;
  - Broker processing to **iFINANCIAL REAL ESTATE** of **\$475.00**;
  - **HOUSEHOLD FINANCE CORP.** for pay in escrow of **\$5,165.74** [*valid creditor's claim*];
  - **CITIBANK USA** for pay in escrow of **\$1,219.00** [*valid creditor's claim*];
  - **CAPITAL ONE** for pay in escrow of **\$2,444.54** [*valid creditor's claim*];
  - **LAW OFFICES OF PATRICIA S. CARRILLO** for legal fees due of **\$7,090.00**.

The following provisions provide support for the attorney fees received by Attorney Patricia Carrillo being reduced and returned to the estate:

- **Probate Code §§ 10830, 10831, and 10501(a)(2)** require the allowance of compensation to the attorney only by court order authorizing such payment. Compensation must be allowed by the Court before it is taken.
- **Probate Code § 12205** allows the Court to reduce the compensation of the attorney if responsible for an unreasonable delay in closing the estate. The time taken for administration of the estate was within the control of the attorney whose compensation would be reduced in that the estate was allowed to linger by the attorney during the communication breakdown between attorney and personal representative.
- **California Rule of Court 7.700 provides: (a) No compensation in advance of court order.** The personal representative must neither pay nor receive, and the attorney for the personal representative must not receive, statutory commissions or fees or fees for extraordinary services in advance of an order of the court authorizing their payment. **(b) Surcharge for payment or receipt of advance compensation.** In addition to removing the personal representative and imposing any other sanctions authorized by law against the personal representative or the attorney for the personal representative, the court may surcharge the personal representative for payment or receipt of statutory commissions or fees or fees for extraordinary services in advance of an order of the court authorizing their payment. The surcharge may include interest at the legal rate from the date of payment.
- **In re Estate of Wong, 207 Cal. App.4<sup>th</sup> 366, 2012:** "...Attorney compensation for services rendered to the personal representative of a probate estate is not paid by the client, but out of the estate itself."

Public Administrator's Final Account and Petition for Distribution

<b>DOD: 4/15/2005</b>	<p><b>PUBLIC ADMINISTRATOR</b> was appointed Successor Administrator of the estate per <i>Minute Order</i> dated 10/21/2014, which states, in pertinent part, that the Court on its own motion relieves Mary Gallegos-Bates as the administrator and appoints the <b>PUBLIC ADMINISTRATOR</b> as the personal representative.</p> <p><b>Status Report Regarding Recovery of Attorney Fees filed 3/19/2015 states:</b></p> <ul style="list-style-type: none"> <li>At the 1/20/2015 hearing, the Court directed the Public Administrator (PA) "to recover the <b>\$7,090.00</b> that was paid from the escrow improperly to Attorney Patricia Carrillo."</li> <li>On 2/12/2015, the PA confirmed that Ms. Carrillo did return the attorney fees she received from escrow;</li> <li>According to the former administrator's final account and report filed on 7/3/2014, all assets of the estate were distributed;</li> <li>There were [loan] proceeds from the real property, but they were paid from escrow to the Decedent's [brother];</li> <li>Since the attorney was also paid from escrow, there was no money in the estate at the time of closing;</li> <li>In fact, a fee waiver was granted, so a filing fee was not paid for the account;</li> <li>The PA has the <b>\$7,090.00</b> in hand;</li> <li>She requests payment for extraordinary services to recover money in the amount of <b>\$192.00</b> (for 2 Deputy hours at \$96.00 per hour);</li> <li>Attorney services were rendered and PA requests payment for extraordinary services of the attorney in assisting her client and preparing this final report and request for instructions; the sum of <b>\$300.00</b> is requested (for 2 hours at \$150.00 per hour);</li> <li>PA also asserts the filing fee for the former administrator's fee should be paid in the amount of <b>\$435.00</b>;</li> <li>If all of the above fees are approved, there will be <b>\$6,163.00</b> remaining;</li> <li>Although Ms. Carrillo should not have been without a Court order, she did provide legal services to the estate, and the PA recommends that the remaining amount be paid to her;</li> <li>County Counsel can prepare an order upon the Court's ruling.</li> </ul>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>		
<input type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input checked="" type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		

Reviewed by: LEG

Reviewed on: 3/20/15

Updates:

Recommendation:

File 1B - Gallegos

**2 Lauren Herzog Trust**

**Case No. 09CEPR00542**

**Atty Barron, Richard B. (for Perine & Dicken Professional Fiduciaries and Conservators)**

**Probate Status Hearing Re: Status on Informal Accounting**

	<b>PERINE &amp; DICKEN PROFESSIONAL FIDUCIARIES</b> , former Trustees, filed its Fourth Account and a Petition to Terminate the Trust that was heard by this court on 09/16/14. The Petition to Terminate the Trust requested a closing reserve of \$5,000.00.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need informal accounting of the \$5,000.00 closing reserve.</p>
<b>Cont. from</b>	<p>Consistent with the Court's recent practices, the court required an informal accounting of the \$5,000.00 closing reserve be filed and set this status hearing to check whether that the informal accounting was filed. The informal accounting was to be filed without triggering a hearing unless the court set a hearing upon review of the informal accounting.</p> <p>As of 03/18/15, no informal accounting of the closing reserve has been filed.</p>	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
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<b>Letters</b>		
<b>Duties/Supp</b>		
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<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 03/18/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 2 - Herzog</b>

**Petition for Attorney's Fees and Costs**

<b>DOD: 12/19/12</b>	<b>DANIEL T. MCCLOSKEY</b> , attorney for Loretta Ramos, heir, is Petitioner.		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><u>CONTINUED TO 04/23/15</u></b>  <b>Per request of Counsel</b></p> <p>1. The Petition does not comply with Local Rule 7.1.1C which states - When a petition or other request for relief is presented to the court, the Probate Code section that allows the requested relief must appear below the title of the pleading. Need authority that allows the relief requested in this petition.</p>
	<b>PAT HERNANDEZ</b> , sister, was appointed as successor Administrator with bond set at \$400,000.00 on 03/19/14 due to the death of the previous administrator, Manuel Rojas.		
<b>Cont. from</b>	Petitioner requests fees in connection with his representation of Loretta Ramos who is decedent's niece and intestate heir. Petitioner states that his client was not initially listed as an heir in the Petition for Probate of Manuel Rojas. His representation resulted in the former administrator recognizing Ms. Ramos as an heir as well as several other heirs that were initially left off the Petition for Probate. Further, his representation led to the Administrator's (both former and successor) being required to secure bond and also locating additional assets of the estate valued at approximately \$10,000.00, which benefitted all heirs of the estate.		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/> <b>Verified</b>			
<input type="checkbox"/> <b>Inventory</b>			
<input type="checkbox"/> <b>PTC</b>			
<input type="checkbox"/> <b>Not.Cred.</b>			
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>			
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	w/		
<input type="checkbox"/> <b>Aff.Pub.</b>			
<input type="checkbox"/> <b>Sp.Ntc.</b>			
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<input type="checkbox"/> <b>Letters</b>			
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<input type="checkbox"/> <b>Objections</b>			
<input type="checkbox"/> <b>Video Receipt</b>			
<input type="checkbox"/> <b>CI Report</b>			
<input type="checkbox"/> <b>9202</b>	Petitioner <b>asks that he be paid</b> from the estate <b>\$2,807.46 in attorney's fees, representing 11.55 hours @ \$250.00/hr., and costs in the amount of \$435.00 for a total request of \$3,042.56.</b>		
<input checked="" type="checkbox"/> <b>Order</b>			
<input type="checkbox"/> <b>Aff. Posting</b>			
<input type="checkbox"/> <b>Status Rpt</b>			
<input type="checkbox"/> <b>UCCJEA</b>			
<input type="checkbox"/> <b>Citation</b>			
<input type="checkbox"/> <b>FTB Notice</b>	Services are itemized by date and include review of correspondence, meetings with client, and court appearance.		
			<b>Reviewed by:</b> JF
			<b>Reviewed on:</b> 03/18/15
			<b>Updates:</b> 03/20/15
			<b>Recommendation:</b>
			<b>File 3 – Sanchez</b>

**(1) First and Final Report of Executor on Waiver of Account and (2) Petition for Final Distribution; for (3) Allowance of Compensation to Attorney and Administrator; for (4) Reimbursement of Costs Advanced**

<b>DOD: 05/27/13</b>	<b>TERRI MAY</b> , Executor, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> Consistent with the Court's recent practice, if Court determines an informal accounting of the closing reserve is warranted, Court will set a Status Hearing as follows:</p> <p><b>Tues 9-22-15 at 9:00 a.m. in Dept. 303 for an Informal Accounting of the \$10,000.00 Closing Reserve.</b></p> <p>Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the date listed, the hearing will be taken off calendar and no appearance will be required. <b>Filing of the informal accounting of closing reserve will not generate a new hearing date.</b></p> <p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 03/19/15</p> <p><b>Updates:</b> 03/20/15</p> <p><b>Recommendation:</b></p> <p><b>File 4 - Duffy</b></p>
	Accounting is waived.	
	I & A - <b>\$2,269,128.28</b>	
	POH - <b>\$2,269,128.28</b>	
	(\$244,347.96 is cash)	
<b>Cont. from</b>	Executor - <b>\$35,835.51</b> (Statutory)	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Executor x/o - <b>\$1,000.00</b> (Per Local Rule for sale of real property)	
<input checked="" type="checkbox"/> <b>Verified</b>	Executor reimbursement - <b>\$776.02</b> (for maintenance of estate property)	
<input checked="" type="checkbox"/> <b>Inventory</b>	Attorney - <b>\$35,835.51</b> (Statutory)	
<input checked="" type="checkbox"/> <b>PTC</b>	Closing - <b>\$10,000.00</b>	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	Preliminary Distribution, authorized by Court order dated 10/29/14 -	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Margaret Romero - Sapphire jewelry	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> w/	Terry May - \$169,272.37	
<input type="checkbox"/> <b>Aff.Pub.</b>	Sunya Taira - \$169,272.37	
<input type="checkbox"/> <b>Sp.Ntc.</b>	<b>Distribution, pursuant to Decedent's Will, is to:</b>	
<input type="checkbox"/> <b>Pers.Serv.</b>	Terri May - \$80,450.46 cash, plus ½ interest in furniture and furnishings of the estate, ½ interest in jewelry, and ½ interest in various securities	
<input type="checkbox"/> <b>Conf. Screen</b>	Sunya S. Taira - \$80,450.46 cash, plus ½ interest in furniture and furnishings of the estate, ½ interest in jewelry, and ½ interest in various securities	
<input type="checkbox"/> <b>Letters</b> 07/18/13		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
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<input checked="" type="checkbox"/> <b>9202</b>		
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<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>		

**(1)First and Final Report of Executor and Petition for its Settlement and (2) for Final Distribution of Estate on Waiver of Accounting**

<b>DOD: 7/13/13</b>	<b>PAMELA J. STRONG</b> , Executor, is petitioner.		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 2/24/15.</b> Minute order states Counsel requests a continuance to file an amended petition; the Court admonishes counsel that her client needs to verify the accountings and reports, and should she fail to do so, then she is ordered to be personally present in court. – <b>Please see additional page for Status Report.</b></p> <ol style="list-style-type: none"> <li>Inventory and Appraisal, partial no. 1 filed on 3/14/14 does not include attachment 1 listing the property.</li> <li>Creditor's Claim of Capital One filed on 8/14/14 in the amount of \$217.45 was not addressed.</li> <li>Need Allowance or Rejection of Creditor's Claim of Capital One.</li> <li>Petition was not signed or verified by Petitioner/fiduciary Pamela J. Strong. Probate Code §1021.</li> <li>Petition does not include a property on hand schedule. California Rules of Court, Rule 7.550(b)(4).</li> <li>Need Notice of Hearing.</li> <li>Need proof of service of the Notice of Hearing on Holy Spirit Catholic Church.</li> <li>Need Order. Local Rule 7.1 states a proposed Order shall be submitted with all pleadings that request relief. If the proposed order is not received in the Probate Filing Clerk's Office ten (10) days before the scheduled hearing, a continuance may be required.</li> </ol>
	Accounting is waived.		
<b>Cont. from 022415</b>	I & A	- \$355,000.00	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Executor	- waives	
<input type="checkbox"/> <b>Verified</b>	Attorney	- waives	
<input checked="" type="checkbox"/> <b>Inventory</b>	Closing	- \$5,000.00	
<input checked="" type="checkbox"/> <b>PTC</b>	<b>Distribution, pursuant to Decedent's Will, is to:</b>		
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	Pamela J. Strong - \$39,000.00 and real property.		
<input type="checkbox"/> <b>Notice of Hrg</b>	Holy Spirit Catholic Church - \$1,000.00		
<input type="checkbox"/> <b>Aff.Mail</b>			
<input type="checkbox"/> <b>Aff.Pub.</b>			
<input type="checkbox"/> <b>Sp.Ntc.</b>			
<input type="checkbox"/> <b>Pers.Serv.</b>			
<input type="checkbox"/> <b>Conf. Screen</b>			
<input checked="" type="checkbox"/> <b>Letters</b>	9/17/13		
<input type="checkbox"/> <b>Duties/Supp</b>			
<input type="checkbox"/> <b>Objections</b>			
<input type="checkbox"/> <b>Video Receipt</b>			
<input type="checkbox"/> <b>CI Report</b>			
<input checked="" type="checkbox"/> <b>9202</b>			
<input type="checkbox"/> <b>Order</b>	X		
<input type="checkbox"/> <b>Aff. Posting</b>			
<input type="checkbox"/> <b>Status Rpt</b>			
<input type="checkbox"/> <b>UCCJEA</b>			
<input type="checkbox"/> <b>Citation</b>			
<input checked="" type="checkbox"/> <b>FTB Notice</b>			
			<b>Reviewed by: KT</b>
			<b>Reviewed on: 3/19/15</b>
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 5 - Strong</b>

**Verified Status Report filed on 3/20/15 states** the Executor has been unresponsive to counsel for quite some time. Unbeknownst to Counsel, Executor had apparently moved to Southern California and did not leave any forwarding contact information. On information and belief, after consultation with the daughter of the Executor and Decedent, Samantha Strong, the Executor is currently hospitalized and receiving treatment for mental and physical ailments. On information and belief, the Executor is no longer competent to act as Executor and should be removed. Counsel for Executor plans to file a petition to remove Pamela Strong as Executor and substitute the daughter of the Decedent and Executor, namely Samantha Strong, to take the actions necessary to close the estate.

The actions necessary to close the estate are: allowance or rejection of creditor's claim and the filing of a verified Petition for Distribution.

First Account Current - Report of Conservatorship

		NGOI NGUYEN, Conservator, is petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Order does not comply with Local Rule 7.6.1C which states all orders settling accounts shall contain a statement as to the balance of the estate on hand, specifically noting the amount of ash in the balance.</p> <p><b>Note:</b> If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> <li><b>Wednesday, February 15, 2017</b> at 9:00 a.m. in Department 303, for the filing of the second account.</li> </ul> <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>
		Please see petition for details.	
<b>Cont. from</b>			
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
✓	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b>	W	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
✓	<b>2620(c)</b>		
✓	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
			<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 3/19/15</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 6 - Nguyen</b></p>

**Petition to Termination of Conservatorship**

<b>DOD: 03/29/14</b>	<b>JOSEPH PATRICK DE LOS REYES,</b>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p style="text-align: center;"><b><u>OFF CALENDAR</u></b>  <b>Amended Petition</b>  <b>Terminating</b>  <b>Conservatorship filed</b>  <b>03/17/15 and set for</b>  <b>hearing on 04/29/15</b></p>
	son/Conservator of the Person and Estate, is Petitioner. Bond of \$30,000.00 was filed 04/07/14.	
<b>Cont. from 012015</b>	Account period: 04/07/14 – 06/30/14	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>	Accounting - \$207,059.14	
<input checked="" type="checkbox"/> <b>Inventory</b>	Beginning POH - \$201,076.17	
<input type="checkbox"/> <b>PTC</b>	Ending POH - \$190,000.00	
<input type="checkbox"/> <b>Not.Cred.</b>	Conservator - not addressed	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Attorney - not addressed	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> w/		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>	<b>Petitioner prays for an Order:</b>	
<input type="checkbox"/> <b>Pers.Serv.</b>	1. Terminating the conservatorship;	
<input type="checkbox"/> <b>Conf. Screen</b>	2. Discharging Petitioner as Conservator of the Person and Estate and exonerating Petitioner's bond.	
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input checked="" type="checkbox"/> <b>2620(c)</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 03/18/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 7 – De Los Reyes</b>



Petition for Termination of Conservatorship of the Estate

	<b>KEITH D'AMBROSIO</b> , Conservator of the person and estate is petitioner.		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need Letters of the person only.</p>
	<b>Petitioner states</b> conservatorship of the estate is no longer required because there are no assets to be claimed by the conservator, nor has he received any assets from the estate of Mr. Tom Steel, who had been taking care of Ms. Farris until his death.		
	As matters unfolded and more clarification was requested, it was learned that Ms. Farris was not to receive anything from Mr. Steel's estate. Instead, Mr. Steel had been residing with Ms. Farris in real property belonging to the estate which Ms. Farris's father had established for her benefit prior to her death. The real property is an asset of the Chester Farris Revocable Trust and any proceeds of sale will be delivered to the trustee.		
	<b>Wherefore, Petitioner requests</b> that the conservatorship of the estate of Donna K. Farris be terminated and new Letters of Conservatorship of the person only be issued.		
<b>Cont. from</b>			
	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		
			<b>Reviewed by: KT</b>
			<b>Reviewed on: 3/20/15</b>
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 9 - Farris</b>

(1) First and Final Account and Report of Executor and (2) Petition for Allowance of Statutory Attorney's Fees and for (3) Final Distribution

<b>DOD: 09/28/13</b>	<b>APRIL S. ROSE</b> , Executor, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Account period: <b>09/28/13 – 01/31/15</b>	
	Accounting - <b>\$177,325.93</b>	
	Beginning POH - <b>\$175,392.12</b>	
<b>Cont. from</b>	Ending POH - <b>\$176,319.10</b>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	(\$36,319.10 is cash)	
<input checked="" type="checkbox"/> <b>Verified</b>	Executor - <b>waived</b>	
<input checked="" type="checkbox"/> <b>Inventory</b>	Attorney (statutory) - <b>\$6,289.57</b>	
<input checked="" type="checkbox"/> <b>PTC</b>	Costs - <b>\$1,547.89</b>	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	(filing fees, probate referee, publication, certified copies)	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Closing - <b>\$1,000.00</b>	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> w/	<b>Distribution, pursuant to decedent's will, is to:</b>	
<b>Aff.Pub.</b>	April S. Rose, as Trustee of THE ROSE FAMILY TRUST dated 08/12/94 -	
<b>Sp.Ntc.</b>	\$27,481.64 cash, plus real property located at 1311 W. Robinson Ave, Fresno and any other property	
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b> 10/07/14		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<input checked="" type="checkbox"/> <b>9202</b>		
<b>Order</b> x		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 03/20/15
		<b>Updates:</b>
		<b>Recommendation:</b> SUBMITTED
		<b>File 10 - Rose</b>

Petition to Modify Trust

<p>L. SJOSTRAND, DOD: 09/18/14</p>	<p><b>CHRISTINA SJOSTRAND</b>, Trustee, is Petitioner.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>		
	<p><b>Petitioner states:</b>                  The <b>L. SJOSTRAND AND CHRISTINA SJOSTRAND DECLARATION OF TRUST</b> (the "Trust") was established on 12/22/98 by L. Sjostrand (aka Leighton Sjostrand) and Christina Sjostrand, husband and wife. Trustor Leighton Sjostrand was diagnosed with throat and lung cancer on 11/10/10 and thereafter proceeded to participate in intense chemotherapy and radiation therapy until his death on 09/18/14.</p>	<p>1. Need Order. Pursuant to Local Rule 7.1.1F - A proposed Order shall be submitted with all pleadings that request relief. If the proposed Order is not received in the Probate Filing Clerk's Office ten (10) days before the scheduled hearing, a continuance may be required.</p>		
<p>Cont. from</p>	<p>Throughout his period of treatment, Petitioner discussed amending the Trust with her attorney. When Trustor's established the Trust in 1998 it included the creation of an exemption trust upon the death of the first spouse, which was designed to shelter as much of the Trust estate as possible, given the applicable tax exemption at that time (1998). By January 2013, the estate tax exemption laws had changed and the estate tax exemption was now in excess of \$5,000,000.00. The Trustor's estate was less than \$3,000,000.00.</p>			
<table border="1"> <tr> <td data-bbox="105 472 162 508"></td> <td data-bbox="162 472 423 508">Aff.Sub.Wit.</td> </tr> </table>		Aff.Sub.Wit.	<p>Petitioner and Leighton Sjostrand instructed Petitioner's attorney to prepare an amended trust that eliminated the exemption trust and allowed the Trust to continue as a simple trust after the death of the first Trustor to die, as well as to make the trust revocable and/or amendable by the surviving Trustor after the first Trustor's death. Petitioner's attorney drafted a First Amended and Complete Restatement of the Trust (attached as Exhibit B), but the Trustor's were not able to execute the amendment before the decedent's death due to extensive travel for treatments and surgery related to his cancer diagnosis.</p>	<p><b>Reviewed by:</b> JF</p>
	Aff.Sub.Wit.			
<table border="1"> <tr> <td data-bbox="105 508 162 543">✓</td> <td data-bbox="162 508 423 543">Verified</td> </tr> </table>	✓	Verified	<p>Petitioner states that it was both Petitioner's and Leighton Sjostrand's desire that the Trust be amended and that he made several statements in support of the amendment during his lifetime.</p>	<p><b>Reviewed on:</b> 03/20/15</p>
✓	Verified			
<table border="1"> <tr> <td data-bbox="105 543 162 579"></td> <td data-bbox="162 543 423 579">Inventory</td> </tr> </table>		Inventory	<p><b>Petitioner prays for an Order</b> modifying the Trust as set forth in Exhibit B.</p>	<p><b>Updates:</b></p>
	Inventory			
<table border="1"> <tr> <td data-bbox="105 579 162 615"></td> <td data-bbox="162 579 423 615">PTC</td> </tr> </table>		PTC	<p><b>Recommendation:</b></p>	
	PTC			
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	Not.Cred.			
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✓	Notice of Hrg			
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✓	Aff.Mail	w/		
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	Video Receipt			
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	CI Report			
<table border="1"> <tr> <td data-bbox="105 1043 162 1079"></td> <td data-bbox="162 1043 423 1079">9202</td> </tr> </table>		9202		
	9202			
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	Order	x		
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	FTB Notice			

**Status Hearing Re: Filing of the Eighteenth Account and Report of Trustees**

	<b>MICHAEL PAPPACODA and JOYCE THOMAS</b> are the current Trustees.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Eighteenth Account.
	Seventeenth Account and Report was approved on 5/1/14.	
<b>Cont. from</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Seventeenth account covered the period from 1/1/13 through 12/31/13.	
<input checked="" type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>	Property on hand at the end of the Seventeenth account was \$184,000.55.	
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>	Minute Order dated 5/1/14 set this status hearing for the filing of the 18 <sup>th</sup> account.	
<input type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>	<b>Status Report filed on 3/19/15</b> states it is the practice of the Trustee to turn over the trust books and records to James Eberwein, CPA. Mr. Eberwein then prepares the trust income tax returns and the court accounting which serves as the basis for the preparation of the petition.	
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>	On 3/18/15 Mr. Knudson states he received the account and supplemental materials from Mr. Eberwein to enable preparation of the petition.	
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202 Order</b>	Mr. Knudson and his staff are diligently working to complete the petition and account; however, it is unclear whether it will be completed, reviewed by the trustees and ready to be filed prior to the status hearing.	
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>	It is respectfully requested that the court continue the status hearing for a period of two weeks or such time as the court deems appropriate.	
		<b>Reviewed by: KT</b>
		<b>Reviewed on: 3/20/15</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 12 - Goering</b>

**Status Hearing Re: Filing of the First Account**

	<b>FRESNO COUNTY PUBLIC GUARDIAN</b> was appointed Conservator of the Person and Estate of Atha Lee Williams at hearing on 07/31/2013.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order of 01/09/2015: Ms. Kruthers requests 60 days. If the petition is filed at least two court days prior, then no appearance is necessary on 03/24/2015.</b></p> <p>1. Need First Account.</p>
	Letters issued on 08/1/2013.	
<b>Cont. from 010915</b>	Partial No. 1 Inventory and Appraisal filed 09/10/2013 shows an estate valued at \$220,000.00 which includes real property.	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>	Final Inventory and Appraisal filed 02/27/2014 shows and estate valued at \$365.84.	
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	Minute Order of 07/31/2013 set this matter for the filing of the First Account.	
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>	<b>Status Report Regarding Filing First Account filed 03/09/2015</b> states the staff person at the Public Guardian's office who prepares the schedules and any other documents necessary for the preparation of conservatee account is currently carrying a double workload. Starting in mid-December 2014, it was necessary that she not only be responsible for her duties, but she is covering for another person who is on medical leave. It is not anticipated that the person on medical leave will return to work until April 21, 2015. As a result, the preparation of account documents has been delayed.	
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>	Therefore, it is respectfully requested that this matter be set out another 90 days to allow the Public Guardian to prepare the documents for all the accounts that have been delayed during this period of double coverage by staff.	
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> LV
		<b>Reviewed on:</b> 03/19/2015
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 13 - Williams</b>

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

<b>DOD: 06/16/2013</b>	<p><b>PUBLIC ADMINISTRATOR</b>, was appointed Administrator with full IAEA authority without bond on 07/31/2013.</p> <p>Letters issued on 08/13/2013.</p> <p>Final Inventory and Appraisal filed 08/22/2013 shows an estate valued at \$160,000.00.</p> <p>Filed Supplemental Inventory and Appraisal filed 01/13/2015 shows an estate valued at \$34,521.47.</p> <p>Minute Order of 07/31/2013 set this matter for the filing of the First Account and/or Final Distribution.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order of 01/09/2015: Ms. Kruthers represents that a supplemental inventory and appraisal is currently with the referee. If the petition is filed at least two court days prior, then no appearance is necessary on 03/24/2015.</b></p> <p>1. Need First Account or Petition for Final Distribution 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>
<b>Cont. from 010915</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<p><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 03/19/2015</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 14 - Kallam</b></p>

DOD: 9-9-13		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><b><u>OFF CALENDAR</u></b></p> <p>Order Settling First and Final Account was entered 3-10-15</p>
Cont from 010915		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 3-18-15
		Updates:
		Recommendation:
		File 15 - Danell

**16 Michael Josiah Robles (GUARD/P)**

**Case No. 13CEPR00697**

**Atty Robles, Joe (Pro Per – Guardian/Paternal Grandfather)**

**Atty Robles, Sharon Pro Per – Guardian/ Paternal Grandmother – Objector)**

**Atty Williams-Ditto, Christina (Pro Per – Petitioner – Mother)**

**Petition for Termination of Guardianship**

		<p><u>Please see Petition for details</u></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need Notice of Hearing.</li> <li>2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Termination of Guardianship for: <ul style="list-style-type: none"> <li>• Joe Robles (Guardian)</li> <li>• Sharon Robles (Guardian)</li> <li>• Michael Robles (Father)</li> <li>• Maternal Grandfather (Not Listed)</li> <li>• Patricia Ditoo (Maternal Grandmother)</li> </ul> </li> </ol> <p><b>For Objector:</b></p> <ol style="list-style-type: none"> <li>1. Objection was not verified.</li> <li>2. Need proof of service of Objection on Christina Robles.</li> </ol>	
<b>Cont. from</b>				
	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>			
	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
	<b>Notice of Hrg</b>			x
	<b>Aff.Mail</b>			x
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
	<b>Letters</b>			
	<b>Duties/Supp</b>			
✓	<b>Objections</b>			
	<b>Video Receipt</b>			
✓	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			
		<p><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 03/19/2015</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 16 - Robles</b></p>		

17 Vincent Dusan (GUARD/P)  
 Atty Ceredi, Adolph J. III (Pro Per – Petitioner – Maternal Uncle)  
 Atty Blajos, Mary (Pro Per – Petitioner – Maternal Aunt)  
 Atty Dusan, Donna (Objector – Paternal Grandmother)  
 Atty Dusan, Jacob Jr. (Objector – Father)  
 Atty Perkins, Vicki (Objector – Father’s Fiance)  
 Atty Dusan, Jacqueline (Objector – Paternal Aunt)

Case No. 14CEPR00425

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

<u>TEMPORARY EXPIRES 03/24/2015</u>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
<u>Please see petition and objections for details</u>			
Cont. from 101514			
	Aff.Sub.Wit.	<p>1. 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:</p> <ul style="list-style-type: none"> <li>Jacob Dusan, Jr. (Father)</li> </ul> <p>2. 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 for:</p> <ul style="list-style-type: none"> <li>Donna Dusan (Paternal Grandmother)</li> <li>Ben Mathis (Maternal Grandfather) – Unless the Court dispenses with Notice.</li> </ul> <p><b>Note:</b> Declaration of Due Diligence filed 09/04/2014 states “unable to locate” “never met this person.”</p>	
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
	Aff.Mail		x
	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		
		<b>Reviewed by:</b> LV	
		<b>Reviewed on:</b> 03/19/2015	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 17 - Dusan</b>	

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

		SHEILA R. SCOTT, mother, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Court Investigator advised rights on 3/17/15.</b>  1. This petition asks for conservatorship of the person and estate. However, Sheila R. Scott has already been appointed as conservator of the person on 9/12/14. In her previous petition Ms. Scott had petitioned for conservator of the both the person & estate however the estate portion was denied.  <b>Note:</b> All Relatives within the second degree consent and waive notice.  <b>Note:</b> If the petition is granted, status hearings will be set as follows:  <ul style="list-style-type: none"> <li>• <b>Wednesday, April 22, 2015</b> at 9:00 a.m. in Department 303, for the filing of the receipt for blocked account.</li> <li>• <b>Wednesday, July 22, 2015</b> at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.</li> <li>• <b>Wednesday, May 18, 2016</b> at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.</li> </ul> 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.
		Please see petition for details.	
<b>Cont. from 021715</b>		<b>Court Investigator Report filed on 2/9/15.</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>	N/ A	
<input type="checkbox"/>	<b>Aff.Mail</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input checked="" type="checkbox"/>	<b>Pers.Serv.</b>		
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input checked="" type="checkbox"/>	<b>Video Receipt</b>		
<input checked="" type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input checked="" type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by: KT</b> <b>Reviewed on: 3/19/15</b> <b>Updates:</b> <b>Recommendation:</b> <b>File 17 - Foster</b>



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

		See petition for details.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>4. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing pursuant to Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on:          - Unknown maternal grandfather          - Sibling Alveon Moultrie</p> <p>5. This petition was filed with a fee waiver. If a guardianship estate is established, the filing fee of \$435.00 will be due.</p> <p><u>Note:</u> Pursuant to Local Rule 7.8.1.1, it is the policy of the Court to block all funds in guardianship estates. Examiner has prepared a separate Order to Deposit Money Into Blocked Account.</p> <p><u>Note:</u> If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> <li>• Tuesday, May 6, 2015 for the filing of the bond or the receipt for blocked account MC-356, as applicable.</li> <li>• Tuesday, July 21, 2015 for the filing of the Inventory and Appraisal pursuant to Probate Code §2610</li> <li>• Tuesday, June 21, 2016 for the filing of the first account pursuant to Probate Code §2620</li> </ul> <p>If the proper items are on file prior to the status hearing dates pursuant to Local Rule 7.5, the status hearings may be taken off calendar.</p> <p>Reviewed by: skc</p> <p>Reviewed on: 3-18-15</p> <p>Updates: 3-23-15</p> <p>Recommendation:</p> <p>File 20 - Moultrie</p>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			

21 **Christian Fane & Miah Fane (GUARD/P)**  
 Atty Bell, Beverly J. (pro per Petitioner/maternal grandmother)  
 Atty Bell, Rodney D. (pro per Petitioner/maternal grandfather)  
 Atty Fane, Nehemiah (pro per Objector/father)

Case No. 14CEPR01144

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

		There is no temporary. Temporary was terminated by minute order dated 2/24/15.	NEEDS/PROBLEMS/ COMMENTS:
		BEVERLY J. BELL and RODNEY D. BELL, maternal grandparents, are petitioners.	
Cont. from 022415		Please petition for details.	<p>Continued from 2/24/15. Minute order states the matter is continued in order for the paternal grandparents to be service with the petition and the objection; they were noticed of the hearing date in open court today. The temporary orders are terminated today. Nehemiah Fane, father, is to pick the minors up after school tomorrow. Beverly Bell and Rodney Bell will have visitation every Friday at 6 pm thru Sunday at 6 pm starting 2/27/15.</p> <p>1. Need proof of service of the Objections on:          a. Alfred Fane (paternal grandfather)          b. Vigie Fane (paternal grandmother)</p>
	Aff.Sub.Wit.		
✓	Verified		
	Inventory	Objections of father, Nehemiah Fane, filed on 1/25/15.	
	PTC		
	Not.Cred.	Court Investigator Report filed on 2/17/15.	
✓	Notice of Hrg		
	Aff.Mail		
	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: KT
			Reviewed on: 3/19/15
			Updates:
			Recommendation:
			File 21 - Fane

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

	Temporary Expires 3/24/15.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Minute order from the temporary hearing dated 2/4/15 states Karen Gonzales is admonished to pay the filing fees forthwith or the Court may consider revoking the orders.</b>  1. Petitioner's Fee Waiver was denied on 1/20/15. Therefore filing fee totaling \$285.00 are now due (\$60 for the Temporary Petition and \$225 for the General Petition).
	<b>KAREN GONZALES</b> , paternal grandmother, is petitioner.	
Cont. from	See petition for details.	
Aff.Sub.Wit.	Court Investigator Report filed on 3/18/15.	
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: 3/20/15
		Updates:
		Recommendation:
		File 22 - Gonzales

**23 Caeden Fisher (GUARD/P)**

Case No. 15CEPR00066

Atty Fisher, Wilma Gail (pro per Petitioner/maternal grandmother)

Atty Fisher, Billy Mark (pro per Petitioner/maternal grandfather)

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

		<p><b>THERE IS NO TEMPORARY.</b> No temporary was requested.</p> <p><b>BILLY MARK FISHER</b>, maternal grandfather, and <b>WILMA GAIL FISHER</b>, maternal grandmother, are petitioners.</p> <p>See petition for details.</p> <p>Court Investigator Report filed on 3/17/15.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></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 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"/>	9202			
<input 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: 3/20/15	
			Updates:	
			Recommendation:	
			File 23 - Fisher	