

**(1) First and Final Account and Report of Executor and Petition for Its Settlement,
 (2) for Allowance of Compensation for Attorney's Fees, and (3) for Final
 Distribution [Prob. C. 10951, 10810 & 11640]**

DOD: 2/11/2011		FRANK E. GILSTRAP II , Executor, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Accounting period: 4/5/12 – 1/31/13	
Cont. from		Accounting - \$177,393.34	
Aff.Sub.Wit.		Beginning POH - \$174,393.34	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$164,432.29 (\$129,232.29 is cash)	
<input checked="" type="checkbox"/>	Inventory	Executor - waives	
<input checked="" type="checkbox"/>	PTC	Attorney - \$6,231.80 (statutory)	
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Distribution, pursuant to Decedent's Will, and agreement of devisee's, is to:	
<input checked="" type="checkbox"/>	Aff.Mail	Frank E. Gilstrap II - 2003 Chevy Astro Van, 2007 Toyota FJ Cruiser, 1971 Tirlum 12' travel trailer, 25% interest in household furniture, furnishings and personal effects and \$30,750.12.	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
<input checked="" type="checkbox"/>	Letters	Marilyn McLaughlin - 25% interest in household furniture, furnishings and personal effects and \$30,750.12.	
	Duties/Supp		
	Objections		
	Video Receipt	Carilyn Weber - 25% interest in household furniture, furnishings and personal effects and \$30,750.12.	
	CI Report		
<input checked="" type="checkbox"/>	9202	Debra Paul - 25% interest in household furniture, furnishings and personal effects and \$30,750.12.	
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 3/18/13
			Updates: 3/19/13
			Recommendation: SUBMITTED
			File 1 - Gilstrap

(1) Waiver of Accounting and (2) Petition for Distribution Under Will (Prob. C. 11640)

DOD: 9-29-11	LINDA STRICKLAND , Executor with Full IAEA without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Accounting is waived	
	I&A: \$305,500.00	
<input type="checkbox"/> Aff.Sub.Wit.	POH: \$305,500.00 (Decedent's interest in various real property)	
<input checked="" type="checkbox"/> Verified	Executor (Statutory): Waived	
<input checked="" type="checkbox"/> Inventory	Attorney (Statutory): Waived	
<input checked="" type="checkbox"/> PTC		
<input checked="" type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Distribution pursuant to Decedent's will:	
<input checked="" type="checkbox"/> Aff.Mail	Michael R. Strickland, Successor Trustee of the Donald W. Strickland Revocable Trust dated 5-24-99 as amended and restated on 10-27-09: Entire estate	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters	9-5-12	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" 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 checked="" type="checkbox"/> FTB Notice		
		Reviewed by: skc
		Reviewed on: 3-15-13
		Updates: 3-21-13
		Recommendation: SUBMITTED
		File 2 - Strickland

Age: 16		TEMP EXPIRES 3-26-13	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Letters signed by both petitioners.</p>
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w	
	Aff.Pub.		
	Sp.Ntc.		
N/A	Pers.Serv.		
✓	Conf. Screen		
	Letters	X	
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		

MARY PEREZ and ALBERTO PEREZ, JR.,
Paternal Grandparents, are Petitioners.

Father: **CIRIACO EDWARD MORA**

- Consents and waives notice

Mother: **JENNIFER CASTENDADA**

- Consents and waives notice

Maternal Grandfather: Dan Flores

- Personally served 1-25-13

Maternal Grandmother: Lydia

- Notice dispensed 12-13-12

Siblings: Ciera Mora, Jessie Castenada, Matthew Cavaso, Jada Mora (ages not provided)

Petitioners state Alexis is autistic and needs special care which Petitioners have provided since 2003. When the mother had her third child, she did not believe her child was safe around Alexis. The mother has had sporadic visitation. Petitioners have cared for her since elementary school. She is now a junior in high school.

Court Investigator Jo Ann Morris filed reports on 12-6-12 and 3-14-13.

Reviewed by: skc

Reviewed on: 3-15-13

Updates:

Recommendation:

File 3 - Mora

Petition for Order Confirming that Property is Trust Asset

	BRYAN L. TAHMAZIAN , successor Trustee, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Petitioner alleges:	
Cont. from	<ul style="list-style-type: none"> • Bob Michigan, as settlor, created the Bob Michigan Living Trust by written declaration on 2/1/2008. • Bob Michigan died on 9/28/2008. • In paragraph 1 of the Declaration of Trust, the settlor declared that he has "set aside and caused to transfer all of his or her rights, title and interest in and to the property described in Annex A to the Trust for the use benefit and enjoyment of the Beneficiaries named herein." In turn, Annex A of the Declaration of Trust refers to "[p]roceeds from all brokerage and financial accounts described in Exhibit C attached," and Exhibit C provides in relevant part: <div style="margin-left: 20px;">Bank of America – Computershare – Stock - \$4,680 shares account no. XXXX</div> <p>Petitioner states California courts have held that a written declaration of trust by the owner of property is sufficient to create a trust in that property, and a transfer of title is unnecessary when a settlor declares himself to be the trustee of his own property.</p> <p>Wherefore, Petitioner prays for an order:</p> <ol style="list-style-type: none"> 1. Confirming that title in and to 4,680 shares of stock in Bank of America, held in Computershare account no. XXXX , is in Bryan L. Tahmazian, as successor Trustee of the Bob Michigan Living Trust dated 2/1/2008. 	
<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	Reviewed by: KT Reviewed on: 3/18/13 Updates: 3/19/13 Recommendation: File 4 - Michigan	
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		

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

DOD: 8/8/2012	LINDA RACHELL RICHARSON , Successor Co-Trustee of the Fairy Lataine Manfredi Living Trust dated 8/4/2012, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. #9a(3) of the petition was not answered re: issue of predeceased child.
Cont. from	40 days since DOD.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	No other proceedings.	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC	Will dated 8/4/2012 devises entire estate to the Fairy Lataine Manfredi Living Trust.	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	I & A - \$150,000.00	
<input checked="" type="checkbox"/> Aff.Mail <input type="checkbox"/> W/O	Petitioner requests court determination that Decedent's 100% interest in real property located at 1891 20 th Street in Kingsburg passes to her as Successor Co-Trustee of the Fairy Lataine Manfredi Living Trust dated 8/4/2012.	
<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		
		Reviewed by: KT
		Reviewed on: 3/18/13
		Updates:
		Recommendation:
		File 5 - Manfredi

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

DOD: 6/29/2011			<p>KIRK KAYAJANIAN, named executor, is petitioner.</p> <p>All heirs waive bond.</p> <p>Full IAEA – o.k.</p> <p>Will dated: 8/10/2010</p> <p>Residence: Fresno Publication: Fresno Business Journal</p> <p>Estimated value of the Estate: Personal property - unknown Real property - (\$96,500.00)</p> <p>Probate Referee: Steven Diebert</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: If the petition is granted, a status hearing will be set as follows:</p> <ul style="list-style-type: none"> Friday, May 16, 2014 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. <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> <p>Note: Inventory and Appraisal has already been filed.</p>
Cont. from				
	Aff.Sub.Wit.	S/P		
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			
✓	Aff.Mail	W/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			<p>Reviewed by: KT</p> <p>Reviewed on: 3/18/13</p> <p>Updates:</p> <p>Recommendation: SUBMITTED</p> <p>File 6 - Kayajanian</p>	

DOD: 9-18-07	LAURA E. DOZIER , spouse, was appointed Administrator with Full IAEA, without bond on 02/04/08. Letters of Administration were issued on 02/04/08.	NEEDS/PROBLEMS/COMMENTS:
		Minute Order 11-30-12: Counsel informs the Court that he may have to withdraw as he is not getting any cooperation from his client who is not responding to any telephone calls or letters. The Court accepts counsel's representation that the lack of cooperation from his client is impairing his ability to move forward with this matter. The Court sets the matter for an Order to Show Cause on 1/22/13 regarding Laura Dozier's failure to fulfill responsibilities of administration; failure to communicate with counsel; failure to fulfill duties to beneficiaries, and imposition of sanctions in the amount of \$200.00. The Court orders Laura Dozier to be present on 1/22/13. Continued to 1-22-13 at 9am in Dept 303. Set on 1-22-13 at 9am in Dept 303 for Order to Show Cause Re: Failure to Fulfill Responsibilities of Administration; Failure to Communicate with Counsel; Failure to Fulfill Duties to Beneficiaries; Imposition of Sanctions in the Amount of \$200.00.
Cont. from 062012, 072712, 113012, 012213	I&A Partial No. 1 filed 12/02/08 reflects \$333,000.00 including real property in Madera County.	
Aff.Sub.Wit.		
Verified		
Inventory	I&A Final filed 12/02/08 reflects \$317,750.00 including real property in Fresno County and various vehicles.	
PTC	(Total I&A: \$647,750)	
Not.Cred.		
Notice of Hrg	On 3-15-12, a Notice of Pendency of Action was filed stating that a Complaint for Money Due has been filed in 12CECG00823 MWA to recover money lent to the Decedent.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.	Upon receipt of the Notice of Pendency of Action, the Court set status hearing for 6-20-12 for failure to file a first account or petition for final distribution.	
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order	At hearing on 6-20-12 , the Court set status conference on 7-27-12 and ordered Ms. Dozier to be personally present. Attorney Knudson provided an address for her.	Minute Order 1-22-13: Mr. Knudson advises the Court that he still needs additional information from Laura Dozier. He further advises that there is a creditor's claim from Fresno County Federal Credit Union. Mr. Knudson requests a continuance. Matter continued to 3/26/13. The Court orders Laura Dozier and David Knudson to be personally present on 3/26/13. Laura Dozier provides the following contact information to the Court: 1423 Griffith Wy, 93705; telephone # 477-9623. Continued to 3/26/13. OSC is dismissed.
	Status Report filed 7-19-12 stated that until the Madera County property is sold, there will not be any funds to pay creditors or make distribution, and it is anticipated that with the gradually improving real estate market, it may be possible to sell. Ms. Dozier requested that the administration be allowed to continue.	1. Need first account or petition for final distribution, or verified status report.
	At hearing on 7-27-12 , Counsel advised that the property consists of 40 acres of undeveloped property in the Coarsegold area, which was appraised at \$333,000, but is worth less. The Court set further status hearing for 11-30-12.	2. The Court may require notice of further status hearings on the parties that have requested special notice of these proceedings.
	At hearing on 11-30-12 , OSC was set for 1-22-13 re Laure E. Dozier's failure to communicate with counsel.	Additional Notes: Creditor's claims of Fresno County Federal Credit Union, Citibank and American Ambulance have been filed in this matter. A request for Special Notice has been filed by Sandra Dozier & Fresno County Federal Credit Union.
Aff. Posting		Reviewed by: skc
Status Rpt	X	Reviewed on: 3-15-13
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 7 - Dozier

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

Age: 7 years	THERE IS NO TEMPORARY		NEEDS/PROBLEMS/COMMENTS:
	No temporary was requested		
	JENNIFER SANCHEZ , maternal aunt, is petitioner and requests appointment as guardian of the estate without bond.		1. The copy of the will attached to the petition is unsigned.
Cont. from	Estimated value of the estate:		Note: there is no record that the original will has been deposited with the court as required. Probate Code §8200 states the custodian of a will shall, within 30 days after having knowledge of the death of the testator, . . . (1) Deliver the will to the clerk of the superior court of the county in which the estate of the decedent may be administered.
Aff.Sub.Wit.	\$25,000.00 (consisting of a car, furniture and furnishings and bank accounts)		For Objector:
✓ Verified	Father: TONY NAVARRO – personally served on 2/25/13		
Inventory	Mother: DECEASED		1. Objections are not signed by the objector. Probate Code § 1020
PTC	Paternal grandfather: Jose Navarro – served by mail on 2/25/13		2. Objections are not verified. Probate Code § 1021.
Not.Cred.	Paternal grandmother: Alicia Navarro – served by mail on 2/25/13.		Note: If the petition is granted, status hearings will be set as follows:
✓ Notice of Hrg	Maternal grandparents: Deceased.		
✓ Aff.Mail	W/	Petitioner states the minor's mother died on 12/13/12. Her revocable trust contains assets to be held for the benefit for the minor. Her estate contains assets that are separate from trust assets. These assets include a car, furniture and furnishings and bank accounts. The exact value of these assets is unknown at this time. Petitioner was nominated as Guardian of the estate of the minor in mother's will dated 1/22/12.	<ul style="list-style-type: none"> • Friday, July 26, 2013 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. • Friday, May 23, 2014 at 9:00 a.m. in Department 303, for the filing of the first account.
Aff.Pub.			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.
Sp.Ntc.			Reviewed by: KT
✓ Pers.Serv.	W/		Reviewed on: 3/18/13
✓ Conf. Screen			Updates: 3/21/13
✓ Letters			Recommendation:
✓ Duties/Supp			File 8 - Navarro
✓ Objections			
Video Receipt			
CI Report	N/A		
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA	N/A		
Citation			
FTB Notice			

Please see additional page

Objection to Petition for Guardianship of the Estate of Christopher Antonio Navarro filed on 3/20/13. Objections state Tony Navarro, father, objects to the petition of Jennifer Sanchez to be appointed as Guardian of the Estate of Christopher Antonio Navarro.

Objector alleges that at the time of the mother's death, there was ongoing litigation pending between the father and the mother regarding child support. Said litigation has spanned a period of several years culminating in an order of primary custody to Respondent at the time of the mother's death.

Mr. Navarro would like the court to take Judicial Notice of the underlying litigation between the father and mother, case no. 08CEFL00595. Mr. Navarro's counsel in that action has recently filed a joinder against Petitioner as trustee, and/or executor of the child's mother regarding the issues of child support and attorney's fees. That matter is still pending.

The instant petition identifies a car, furniture, furnishings, and bank accounts as assets. Should the court be inclined to grant the guardianship of the estate over these specific assets Mr. Navarro would possibly consent. However, it is the contention of Mr. Navarro that the child's deceased mother also had benefits with Cal STRS. It is believed as a result, there will be an ongoing benefit paid from such funds for the benefit of the minor child. As the sole custodial parent, and the person who is solely responsible for the care of the minor, Mr. Navarro objects to Petitioner being given any authority to collect or disburse such funds.

Mr. Navarro contends that a guardianship of the estate is not necessary. Mom's will apparently bequeaths the specific items to the child, and the same will provides that the Executor may represent the child regarding distribution of the decedent's personal property, there would seem to be a need to probate of such estate rather than a Petition for Guardianship of the Estate.

9A Autumn Petty (GUARD/P)

Case No. 04CEPR00502

Atty Ruth-Heffelbower, Duane (pro per Petitioner/Guardian/paternal grandfather)

Atty Ruth-Heffelbower, Clare Ann (pro per Petitioner/Guardian/paternal grandmother)

Atty Petty, Cheryl (pro per maternal grandmother)

Petition for Termination of Guardianship

Age: 12 years	DUANE RUTH-HEFFELBOWER and CLARE ANN RUTH-HEFFELBOWER, guardians/paternal grandparents, are petitioners.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of service on Autumn Petty (minor)</p>
Cont. from	DUANE RUTH-HEFFELBOWER and CLARE ANN RUTH-HEFFELBOWER were appointed guardians on 5/15/12.	
<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	Father: ANDREW RUTH-HEFFELBOWER – served by mail on 1/16/13	
<input checked="" type="checkbox"/> Aff.Mail	Mother: JAYE RUTH-HEFFELBOWER – consents and waives notice.	
<input type="checkbox"/> Aff.Pub.	Maternal grandfather: Donn Petty – consents and waives notice.	
<input type="checkbox"/> Sp.Ntc.	Maternal grandmother: Cheryl Petty – consents and waives notice.	
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	Petitioners state Cheryl Petty, Autumn's maternal grandmother was Autumn's guardian for many years. Autumn wants to return to her care and Cheryl has agreed to file a petition for successor guardianship.	
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report	Court Investigator Charlotte Bien's Report filed on 3/15/13	
<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		
		Reviewed by: KT
		Reviewed on: 3/19/13
		Updates:
		Recommendation:
		File 9A - Petty

9B Autumn Petty (GUARD/P)

Case No. 04CEPR00502

Atty Ruth-Heffelbower, Duane (pro per Guardian/paternal grandfather)

Atty Ruth-Heffelbower, Clare Ann (pro per Guardian/paternal grandmother)

Atty Petty, Cheryl (pro per Petitioner/maternal grandmother)

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

Age: 12 years	CHERYL PETTY , maternal grandmother, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of <u>personal</u> service of the Notice of Hearing along with a copy of the Petition or consent and waiver of notice on:</p> <p>a. Andrew Ruth-Heffelbower (father)</p> <p>b. Autumn Petty (minor)</p> <p>Note: Cheryl Petty filed a proof of service showing she served Anthony Ruth-Heffelbower by mail on 3/8/13. A party to the action cannot serve the documents. In addition Probate Code §1511 requires that the father be personally served.</p>
Cont. from	DUANE RUTH-HEFFELBOWER and CLARE ANN RUTH-HEFFELBOWER were appointed guardians on 5/15/12. – Both guardians consent and waive notice.	
<input type="checkbox"/> Aff.Sub.Wit.	Father: ANDREW RUTH-HEFFELBOWER	
<input checked="" type="checkbox"/> Verified	Mother: JAYE RUTH-HEFFELBOWER – consents and waives notice.	
<input type="checkbox"/> Inventory	Maternal grandfather: Donn Petty – consents and waives notice.	
<input type="checkbox"/> PTC	Petitioner states: granting the guardianship is in the best interest of the minor. The guardians agree.	
<input type="checkbox"/> Not.Cred.	Court Investigator Charlotte Bien's Report filed on 3/15/13.	
<input checked="" type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	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		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 3/19/13
		Updates: 3/20/13
		Recommendation:
		File 9B - Petty

Atty LeVan, Nancy J., sole practitioner (for Petitioners Ronald Webb and Jeanine Luttrell)
 Pro Per Webb, Daniel P., (Pro Per Objector, son)

Petition for Appointment of Temporary Conservatorship of the Person and Estate

Age: 83 years	TEMPORARY GRANTED EX PARTE EXPIRES 3/26/2013	NEEDS/PROBLEMS/COMMENTS:
	<u>GENERAL HEARING SET FOR 4/23/2013</u>	
	RONALD WEBB , son, and JEANINE LUTTRELL , daughter, are Petitioners and request appointment as Co-Conservators of the Person and Estate with bond set at \$150,784.15 .	Court Investigator Advised Rights on 3/14/2013.
Cont. from	Estimated Value of the Estate:	Note: Order Appointing Temporary Conservator of the Person and Estate filed 3/13/2013 based upon the granting ex parte of the temporary petition fixes bond in the amount of \$150,784.15 . Court records show that <i>Letters of Temporary Conservatorship</i> have not issued as of 3/20/2013.
<input type="checkbox"/> Aff.Sub.Wit.	Personal property - \$125,000.00	
<input checked="" type="checkbox"/> Verified	Annual income - \$11,820.00	
<input type="checkbox"/> Inventory	Total - \$136,820.00	
<input type="checkbox"/> PTC	Petitioners state:	
<input type="checkbox"/> Not.Cred.	<ul style="list-style-type: none"> The proposed Conservatee was recently taken to Sherman Oaks Hospital [in Ojai] and found to be unable to care for herself, and she was placed on a 30-day hold after a Riese hearing; Proposed Conservatee often feels paranoid, and engages in odd behaviors due to her fears and illusions, and she is a hoarder; Proposed Conservatee's finances are in complete disarray as she has not taken care of her affairs since 2006, and her ranch property is in danger of foreclosure because of past due taxes; Proposed Conservatee has been through the loss of a child, her husband leaving her, and her oldest son [Daniel Webb] trying to harm her, causing the proposed Conservatee to have a restraining order placed against him and having him evicted off the ranch; Two persons are taking advantage of the proposed Conservatee: RUSS WHITMEYER, who is trying to get her to sign over her ranch property to him; and PATTI NEAL, who is living rent-free on the ranch and boarding horses there rent-free. 	
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv.		
<input checked="" type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/S		
<input checked="" type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202 Order		
<input type="checkbox"/> Aff. Posting		Reviewed by: LEG
<input type="checkbox"/> Status Rpt		Reviewed on: 3/18/13
<input type="checkbox"/> UCCJEA		Updates: 3/19/13; 3/20/13
<input type="checkbox"/> Citation		Recommendation:
<input type="checkbox"/> FTB Notice		File 10 - Webb
	~Please see additional page~	

Petitioners request the proposed Conservatee's residence be changed to the home of Petitioner Ronald Webb, as the hospital is willing to discharge her to the Petitioners' custody as her nominated conservators. *(Nomination of the Petitioners filed on 3/12/2013.)*

Court Investigator Jennifer Daniel's Report was filed on 3/19/2013 and recommends the petition be GRANTED.

Objection to Petition for Appointment of Probate Conservator of the Person and Estate of Sylvia Nadine Webb filed on 3/20/2013 by DANIEL PARKER WEBB, son, states:

- He objects to the appointment of his siblings Sylvia J. Luttrell and Ronald Webb as Conservators without being included as the eldest surviving sibling and an equal; he feels that his mother would wish them all to be equals in that capacity;
- It is his belief that his siblings are possibly attempting to sequester his mother in order to limit his contact by moving her to Fresno County, where it is a hardship for him to travel;
- He further believes that they are attempting to limit his involvement in this Conservatorship by excluding his mother from the hearing through referencing a Capacity Declaration, which was not attached to the copy of the Petition he was served with the Notice of Hearing;
- He has concerns that his siblings do not truly have the best intentions for welfare of his mother, since her desires are to return to her home in Ventura County, and their plans are to warehouse her in an elderly facility in Fresno close to their residence;
- He believes that his mother needs to be present for questioning by the Court as to her desires regarding who should be included in her Conservatorship;
- He believes she would want him to be involved in the important function of the protection of her interests;
- He further objects to the Petition based upon the presentation of unfounded allegations it contains such as that he wishes his mother to die so that he could receive an inheritance; this is not factual;
- Also, the statement made that he is working with **RUSS WHITMEYER** to gain control of his mother's property is unfounded and not true;
- He prays that the Court will not grant appointment of a Conservator until these issue and allegations are resolved to the Court's satisfaction.

Petition for Appointment of Temporary Conservatorship

Age: 85	<u>TEMPORARY GRANTED EX PARTE;</u> <u>EXPIRES 03/26/13</u>		NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 03/15/13. 1. Need proof of personal service at least 5 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Temporary Petition</i> on proposed conservatee.	
	<u>GENERAL HEARING 04/18/13</u>			
Cont. from	<p>PUBLIC GUARDIAN, is Petitioner and requests appointment as Temporary Conservator of the Person & Estate.</p> <p>Estimated Value of the Estate: Personal property - \$ 2,500.00 Annual income - 29,000.00 Total - \$31,500.00</p> <p>Petitioner states that the Public Guardian received a referral from Adult Protective Services regarding Mr. Simpson. An investigation has revealed that he has fallen prey to a telephone scam and has overextended a large credit line on his home, has fallen behind on his payments and has failed to pay his property taxes. Mr. Simpson is also thin and frail, his home is falling into disrepair and he lacks food. He stated that he has not seen a doctor in many years and appears to be confused about normal life conditions. Petitioner states that a conservatorship is necessary to ensure that Mr. Simpson's finances are managed frugally, to stop the financial exploitation, and to ensure proper personal medical care and food.</p> <p>Court Investigator Samantha Henson filed a report on 03/20/13.</p>			
<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.				x
<input type="checkbox"/> Conf. Screen				n/a
<input type="checkbox"/> Letters				x
<input type="checkbox"/> Duties/Supp				n/a
<input type="checkbox"/> Objections				
<input type="checkbox"/> Video Receipt				
<input checked="" type="checkbox"/> CI Report				
<input checked="" type="checkbox"/> PG Report				
<input type="checkbox"/> Order				x
<input type="checkbox"/> Aff. Posting				
<input type="checkbox"/> Status Rpt				
<input type="checkbox"/> UCCJEA				
<input type="checkbox"/> Citation				
<input type="checkbox"/> FTB Notice				
			Reviewed by: JF Reviewed on: 03/18/13 Updates: 03/20/13 Recommendation: File 11 - Simpson	

(1) Waiver of Accounting and (2) Petition for Allowance of Statutory Fees to Attorney for Executor and (3) Petition for Final Distribution

DOD: 04/10/12		MARIA G. RESENDES , Executor, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u> Amended Accounting filed 03/18/13 and set for hearing on 04/30/13</p> <ol style="list-style-type: none"> The Petition indicates that some of the beneficiaries named in the will are deceased; however, their dates of death were not indicated in the Petition for Probate as required by Local Rule 7.1.1D. Need dates of death for: <ul style="list-style-type: none"> - Rafael Resendes - Marta G. Fields - Caridad G. Capote The Petition proposes to distribute the entire estate to Maria G. Resendes and states that she is the sole beneficiary; however, the Codicil to the Will dated 12/04/03 appears to devise the decedent's residence to his niece Dr. Mariela Resendes. Therefore, it appears that the residence should be distributed to Mariela Resendes. Need clarification. A waiver of accounting has been filed by Maria Resendes, but it appears that Dr. Mariela Resendes is also a beneficiary of the estate and therefore a waiver of accounting is needed from her or an accounting will be needed. Need clarification. The Petition does not address whether the notice required under Probate Code § 9202(b) to the Victims Compensation Board is needed.
		Accounting is waived.	
		I &A - \$178,280.53	
		POH - \$178,280.53	
Cont. from 03/12/13		(\$38,280.53 is cash)	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory	Executor - waived	
<input checked="" type="checkbox"/>	PTC	Attorney - \$6,348.41 (statutory)	
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Distribution, pursuant to Decedent's will is to:	
<input checked="" type="checkbox"/>	Aff.Mail	Maria G. Resendes - \$38,280.53	
<input type="checkbox"/>	Aff.Pub.	cash plus real property	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters	10/05/12	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202	X	
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
			Reviewed by: JF
			Reviewed on: 03/18/13
			Updates: 03/20/13
			Recommendation:
			File 12 - Fields

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Age: 5	<u>GENERAL HEARING 05/01/2013</u>	NEEDS/PROBLEMS/COMMENTS:
	CHARLOTTE ASHLEY , paternal grandmother, is petitioner.	1. Need Notice of Hearing.
	Father: JERMAINE WILLIAMS	2. Need proof of personal service five (5) 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:
Cont. from	Mother: LEJEANA RAMSEY	<ul style="list-style-type: none"> • Jermaine Williams (Father) • Lejeana Ramsey (Mother)
Aff.Sub.Wit.	Paternal Grandfather: Jhonin Williams	3. UCCJEA does not provide the child's residence for the past five years as required.
✓ Verified	Maternal Grandfather: Mark Ramsey	
Inventory	Maternal Grandmother: Denise Ramsey	
PTC		
Not.Cred.		
Notice of Hrg	Petitioner states: The child has been residing with the petitioner for the past year.	
Aff.Mail	Petitioner alleges that the child does not get the care from his mother he needs. The father is prison. Petitioner alleges that on 02/01 the mother grabbed the child out of the car and wanted to the fight the petitioner. 911 was called and a report was made.	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
✓ Conf. Screen		
✓ Letters		
✓ Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
✓ UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 03/18/13
		Updates:
		Recommendation:
		File 13 - Williams

1A Zachary Filgas (GUARD/P)

Case No. 10CEPR00914

Atty Kilpatrick, Patricia (Pro Per – Maternal Grandmother – Petitioner)
Atty Attashian, Zepure (for Elaine Thomas – Paternal Grandmother – Temporary Guardian)
Atty Hopper, Cindy J. (for Rachel Stauffer – Mother) (formerly represented by Atty Jennifer Walters)
Ex Parte Petition for Grandparents Visitations (fam. Code 3104) and Petition to Join as Party to Guardianship Hearings of Zachary Filga

Age: 2	TEMPORARY GUARDIANSHIP EXPIRES 3-26-13	NEEDS/PROBLEMS/COMMENTS:
	PATRICIA KILPATRICK , Maternal Grandmother, is Petitioner.	Continued from 10-30-12, 1-22-13. Trial is also set for 3-26-13.
	ELAINE THOMAS , Paternal Grandmother, is Temporary Guardian.	Minute Order 10-30-12: Ms. Attashian is also appearing specially for Attorney Martin Gamulin who is representing the father. Ms. Attashian informs the Court that the father was not provided notice. Matter continued to 1/22/13 due to lack of notice to the father. The Court directs Ms. Attashian to advise Mr. Gamulin that he is to be present at the next hearing on 1/22/13. Continued to 1/22/13.
Cont. from 103012, 012213	Petitioner's Ex Parte Petition states she has been active in Zachary's life since he was born; however, she has been denied visits since the 7-19-12 settlement agreement between the temporary guardian and the mother. Petitioner was present at that hearing, but no one discussed her visitation rights. Petitioner previously had unsupervised overnight visits, and both she and Zachary enjoyed them. He did not cry when being left with her. The visits were separate from Rachel's visits because Rachel wants to see Zachary by herself.	Minute Order 1-22-13: Matter set for Court Trial on 3/26/13 with a half day estimate. The Court directs both counsel to exchange witness lists and submit trial briefs by 3/22/13. The temporary is extended to 3/26/13. Parties agree to participate in mediation regarding the issues of visitation and guardianship on 1/29/13 at 2:00 p.m. Set on 3/26/13 @ 1:30 p.m. Dept. 303 for: Court Trial Temporary extended to 3/26/13
Aff.Sub.Wit.	Petitioner states Elaine previously told her that all she had to do was call to see Zachary, but when she requested to see him on 8-19-12, she did not respond. She sent follow up emails (attached), and received a message that she couldn't see him because someone else was visiting that day. Instead, she offered a day that she knew Petitioner could not visit because she was returning to San Jose.	Per Order After Hearing filed 7-31-12, Mother (Rachel Stauffer) to have unsupervised visitation every Saturday for three months, and overnight visits thereafter. The order also contains provisions for various holidays and states the father's visitation must be supervised. The trial date was vacated, and a review hearing was scheduled for 1-22-13.
Verified	Petitioner states she is now retired and is available through the week to see Zachary. To prevent future problems with her right to visit, Petitioner proposes a schedule including visits on Zachary's birthday, and December, and monthly 3-day visits, with makeup visits if cancellation occurs. <u>See Petition for details.</u> Exchanges to take place at Janet Appleton's residence or mutually agreed place. Temporary Guardian to provide medical care information in case of emergency.	Note: Petitioner (Maternal Grandmother) resides in San Jose, CA.
Inventory		SEE PAGE 2
PTC		Reviewed by: skc
Not.Cred.		Reviewed on: 3-19-13
Notice of Hrg		Updates:
Aff.Mail		Recommendation:
Aff.Pub.		File 1A - Filgas
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	The Court set the Petition for hearing. Petitioner to provide appropriate notice to interested parties.	
	SEE ADDITIONAL PAGES	

Janet Appleton filed a supporting declaration indicating that her home is open for visits.

Petitioner filed a supplemental declaration on 10-19-12 indicating that since her petition, she has been refused visits unless they are with the mother. Zepure Attashian, attorney for the temporary guardian, told her the reason her visits are being refused is because Petitioner intimidated the temporary guardian by saying she was having her followed. This accusation is not true.

Petitioner states the temporary guardian knows that Rachel (Mother) will not allow Petitioner to see Zachary during her visits because she is upset that Petitioner supported the petition for guardianship, and feels that if Petitioner is there, Zachary will not bond with her. The temporary guardian's refusal to let Petitioner see Zachary appears to stem from the fact that she was told by Janet Appleton that Petitioner was retiring and planned to move to Fresno to see her daughter and grandson more frequently. Ms. Appleton thought the temporary guardian would be pleased to hear that, but instead was distressed.

Petitioner states she has never been a threat to Zachary or to Elaine Thomas (temporary guardian).

Petitioner proposes a revised visitation schedule. See Declaration.

Mother filed a Declaration on 2-1-13 provides information and requests the temporary guardianship be terminated.

Note: Per Substitution of Attorney filed 2-15-13, the mother is now represented by Attorney Cindy Hopper.

NEEDS/PROBLEMS/COMMENTS (Continued):

1. **Petitioner filed "Proof of Personal Service" showing service on the attorneys for Temporary Guardian and Mother, but the parties were not served directly with a Notice of Hearing.**

The Court may require continuance for direct service pursuant to Cal. Rules of Court 7.51 and Probate Code §§ 1220, 1214.

