

(1) First and Final Account and Report of Successor Administrator and (2) Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and (3) for Distribution

DOD: 05/04/2006	PUBLIC ADMINISTRATOR , Successor Administrator, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Court may require Letters confirming that Gayle Ferguson was appointed Administrator of Melvin O'Brien's estate and is qualified to receive funds.</p>
	Account period: 10/20/2014 to 12/15/2014	
Cont. from 021815	Accounting - \$125,000.00	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$125,000.00	
<input checked="" type="checkbox"/> Verified	Ending POH - \$58,444.52	
<input checked="" type="checkbox"/> Inventory	Executor (Statutory) - \$2,560.00	
<input type="checkbox"/> PTC		
<input checked="" type="checkbox"/> Not.Cred.	Attorney (Statutory) - \$2,560.00	
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail w/	X/O - \$1,000.00 (for Court confirmed sale of real property pursuant to Local Rule 7.18(B)(1))	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Costs (Certified copies) - \$25.50	
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters	Bond - \$52.10	
<input type="checkbox"/> Duties/Supp	Distribution, pursuant to intestate succession, is to:	
<input type="checkbox"/> Objections	<ul style="list-style-type: none"> • Arthur K. O'Brien - \$17,270.64 • Michael R. O'Brien - \$17,270.64 • Gayle Ferguson as Administrator of the Estate of Melvin O'Brien - \$17,270.64 	
<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: LV
		Reviewed on: 03/24/2015
		Updates:
		Recommendation:
		File 1 – O'Brien

DOD: 11-5-14	PAMELA L. GORDY , Daughter and Conservator with bond of \$57,197.99, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 5-1-14 through 11-5-14	
	Accounting: \$63,799.86	
	Beginning POH: \$51,998.17	
	Ending POH: \$43,660.74	
<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 checked="" 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	
	Account period: 11-6-14 through 12-31-14	
	Accounting: \$44,151.39	
	Beginning POH: \$43,660.74	
	Ending POH: \$40,781.89 (cash)	
	Attorney: \$1,250.00 (Per local rule)	
	Costs: \$435.00 (Filing)	
	Petitioner states the Conservatee died leaving a will, copy attached; however, Petitioner has been unable to locate the original will. The beneficiary is Petitioner, her only child. After payment of fees totaling \$1,685.00, there will be \$39,096.89 remaining. Petitioner requests to distribute \$39,096.89 and any other property of the deceased Conservatee not now known or discovered to Petitioner under Probate Code §§ 13100-13115 pursuant to a signed declaration.	
	Petitioner prays for an order:	
	1. Finding that the conservatorship of the person terminated on 11-5-14, the date of the conservatee's death;	
	2. Approving, allowing, and settling the account and report of the conservator as filed;	
	3. Authorizing the attorney fees;	
	4. Authorizing and directing Pamela L. Gordy to deliver the property remaining in her possession to Pamela Lynn Gordy, subject to a lien for any amounts of the payments herein authorized that remain unpaid, and that on delivering the property and filing proper receipts, the conservator of the person and estate be discharged and the surety on her bond be discharged; and	
	5. Such other relief as the Court considers proper.	
		Reviewed by: skc
		Reviewed on: 3-24-15
		Updates:
		Recommendation:
		File 2 – Gordy

Page 2 – NEEDS/PROBLEMS/COMMENTS:

1. Petitioner requests that the entirety of statutory attorney compensation be paid to Curtis Rindlisbacher as attorney for the former personal representative, and requests extraordinary fees to County Counsel, attorney for the Public Administrator, for tasks that are statutory in nature. The Court may require clarification with reference to the following timeline of events pursuant to the Court file:

- Earl Cunningham's Petition for Probate filed 4-8-11 estimated \$60,000 in personal property. Although he is a resident of Carlsbad, NM, he was appointed without bond on 5-19-11 pursuant to waivers from the three other heirs.
- Over a year later, on 7-24-12, Mr. Rindlisbacher subbed out as Mr. Cunningham's attorney. Examiner notes that by this time, statutory deadlines for the filing of the I&A and final distribution had been missed, without explanation.
- The Court then set status hearing for 10-19-12. Mr. Cunningham (in pro per) appeared via Courtcall and advised that he had the I&A completed. He missed a subsequent hearing, but filed two I&As, a partial and the final, totaling \$8,800.00, by January 2013. When he missed a subsequent status hearing for closing the estate, an OSC was set, and he was then removed.
- The Public Administrator then completed administration as set forth in this petition.
- Examiner notes that Mr. Rindlisbacher subbed out prior to the filing of any I&A, without explanation as to why the estate was not on track to close pursuant to statutory requirements and why the attorney subbed out. Pursuant to Probate Code § 12205, the Court may reduce compensation of the personal representative or the attorney for delayed estates.
- Further, according to the Disbursements Schedule, Mr. Rindlisbacher was reimbursed \$876.44; however, no itemization is provided. What did this reimbursement cover?
- Examiner also notes that the file does not indicate any explanation for why \$60,000 was originally estimated, but the I&A total was only \$8,800. Did the Public Administrator or the attorney for the former administrator look into this?
- There has been no accounting by the former administrator. Pursuant to Probate Code § 10953, the Court may compel an account by the former administrator or the attorney for an absconded administrator.

Atty Herold, Kim M. (for Petitioners Ronald Dicken, Patricia Dicken and Karen Steele, Co-Trustees)

First Report and Account of Trustee; Petition for Its Settlement and Allowance of Trustee and Attorneys Fees

	RONALD DICKEN, PATRICIA DICKEN, and KAREN STEELE , private professional fiduciaries and Co-Trustees, are Petitioners.		NEEDS/PROBLEMS/COMMENTS: Continued from 3/12/2015. Minute Order states Counsel is to file a declaration addressing the questions in the Examiner's notes. Additionally, parties are to report back regarding the safety issues raised by the Court. [Please refer to additional page for Declaration of Ronald J. Dicken to Clarify First Account and Report filed on 3/20/2015.]
	Account period: 11/14/2013 – 9/30/2014		
	Accounting - \$142,811.33		<p>Note: If Petition is granted, Court will set a status hearing for the next account in one of the following alternatives:</p> <ul style="list-style-type: none"> • Monday, November 30, 2015 at 9:00 a.m. in Dept. 303 for filing of the Second Account; <p>OR</p> <ul style="list-style-type: none"> • Wednesday, November 30, 2016 at 9:00 a.m. in Dept. 303 for filing of the Second Account. <p>Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the dates listed, the hearing will be taken off calendar and no appearance will be required. ~Please see additional page~</p>
	Beginning POH - \$0.00		
	Ending POH - \$133,460.67		
	(\$111,240.72 in Stifel Nicolaus Investment account--no gains or losses; and \$22,219.95 in cash;)		
	Trustee - \$6,918.75 (paid) (for 55.35 hours @ \$125.00 per hour; includes travel from Visalia to Fresno to meet with Beneficiary and Choua Yang, brother;)		
	Attorney - \$1,505.00 (for 4.30 hours @ \$350.00 per hour attorney rate)		
	Costs - \$200.00 (filing fee)		
	Bond - \$163,506.92 (sufficient)		
	Petitioner prays for an Order:		
	<ol style="list-style-type: none"> 1. Approving, allowing and settling the First Report and Account of the Trustee; 2. Ratifying and approving the compensation paid to Trustees; 3. Authorizing Trustees to pay the Attorney fees and reimbursement of costs; and 4. Authorizing payment to the Trustee of periodic fees on a monthly basis pursuant to its current fee structure of \$125.00 per hour and to deduct it and other costs of administration from the funds in its hands. 		
			Reviewed by: LEG
			Reviewed on: 3/24/15
			Updates:
			Recommendation:
			File 5 - Yang
Cont. from 031215			
<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/O		
<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			

NEEDS/PROBLEMS/COMMENTS, continued:

Notes Re Expenditures for Beneficiary's Special Needs: Per the Court's direction, the **Declaration of Ronald J. Dicken to Clarify First Account and Report filed on 3/20/2015** describes efforts by the Trustees and the Court-approved member of the Trustee Advisory Committee, consisting of **CHOUA YANG**, the Beneficiary's English-speaking brother, to identify, understand and meet the special needs of **FONG YANG** and provides further information regarding protective measures for attempting to meet some of the Beneficiary's special needs. Previous issues raised in the form of excerpts from the *Trust Time Statements of Trustees Perine and Dicken attached as Exhibit C* regarding the need for protective measures for Fong are retained below, with responses contained in the *Declaration of Ronald J. Dicken to Clarify First Account and Report filed on 3/20/2015* shown in **bold text**:

- 7/30/2014 – To Fresno for site visit.... Choua reports that after much discussion the playground equipment [for Fong] has been put on the back burner along with a request for computer desk with concerns for the safety of the corners of the desk and Fong trying to hurt himself.... There is no need for special [non-breakable] windows and regular windows will be fine.... Fong is in need of dental work and Choua asked that if insurance does not cover anesthesia can the Trust pay for it and any other charges. **Declaration of Ronald J. Dicken to Clarify First Account and Report filed on 3/20/2015 states the Beneficiary is now seeing [a doctor] for medication therapy; after taking [specified] medication for two months it was discontinued, but the Beneficiary has remained calm and is not trying to hurt himself. Because of the Beneficiary's seizure disorder, it has been difficult to schedule his required dental care, and the sedation required is risky due to his seizures; Beneficiary's family has been coordinating his care through CVRC and the Trustees will pay the expenses of his dental care, including anesthesia, that are not covered by insurance.**
- 9/25/2014 – To Fresno for site visit with Fong and caregiver/brother, Choua.... When case manager was approaching Fong's room he ran into the bathroom.... Choua noted he is running out of ideas to keep Fong busy, so that he won't hurt himself.... Choua stated Fong ran away from home and was found by police 8 miles away from home. Fong needs to be watched and have someone with him at all times.... Choua would like to get a durable swing set for Fong to try to give him something else to do and keep him busy. **Declaration of Ronald J. Dicken to Clarify First Account and Report filed on 3/20/2015 states the family has requested the Trustees purchase playground equipment for the Beneficiary to relieve his autism-related anxiety and ADHD issues, as swinging on a playset appears to have a very positive calming effect on him; if the Beneficiary managed to escape the house unsupervised, the hope is that he would swing on the playground equipment rather than run away; the family has now found playground equipment that could safely handle adult weight, and the requested equipment would cost \$375.00 plus tax and shipping (copy of quote for purchase attached as Exhibit A).**
- The family had originally requested non-breakable windows be purchased, but the estimate was ~\$90,000.00 for purchase and installation; the family has determined that the broken windows in Beneficiary's residence be replaced with regular windows that would be sufficient to help keep the Beneficiary from escaping the residence or hurting himself; the residence is owned by a relation of the Beneficiary's family; the cost for replacement windows would be between \$940.00 to \$2,200.00; the Trustees are waiting for bids from San Joaquin Glass and Valley Glass.
- (*Note: Depending upon the cost, Trustees might consider the purchase of a removable non-scalable perimeter fence around the residence to help prevent the Beneficiary from leaving the property (from a vendor such as Guardian Fencing.)*)

~Please see additional page~

NEEDS/PROBLEMS/COMMENTS, continued:

Note for the future reference of the Petitioner and Attorney: *Declaration of Ronald J. Dicken to Clarify First Account and Report* filed on 3/20/2015 includes *Exhibit A* containing the original bank statements for the current account period. The notes prepared for the last hearing raised the issue for future reference regarding the bank account statements submitted by the Petitioner because they were copies attached to the accounting schedules as *Exhibit D*, rather than original bank account statements pursuant to Probate Code § 2620(c)(2), thus the statements themselves in that they are now original are satisfactory. However, the notes further raised the issue that the statements were not filed in a separate affidavit in accordance with **Probate Code § 2620(c)(7)** which provides, in pertinent part, that the account statements shall be attached to a separate affidavit describing the character of the document, captioned "CONFIDENTIAL FINANCIAL STATEMENT" in capital letters. Trustees have again filed the bank account statements into the case without protecting the sensitive information by complying with Probate Code § 2620(c)(7), and these notes again set forth the relevant provision for future reference since the filing cannot now be undone.

			See petition for details.	NEEDS/PROBLEMS/COMMENTS:
Cont from 012215, 030515				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 3-24-15	
			Updates:	
			Recommendation:	
			File 6 – Littleton	

Petition for Factual Findings Regarding Elvin's Eligibility to Apply for Special Immigrant Juvenile Status

Age:		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Order Regarding Eligibility for Speical Immigrant Juvenile Status was signed on 2-26-15 along with the Order Appointing Guardian of Minor.</p>
DOD:		
Cont. from		
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: 3-24-15
		Updates:
		Recommendation:
		File 8 – Guardado

Cont. from		
	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	
NEEDS/PROBLEMS/COMMENTS:		
<u>OFF CALENDAR</u>		
Minute Order of 02/19/2015: Continued in order for Will to be deposited. If will is deposited, then the Court is prepared to approve this matter ahead of time.		
Will deposited on 03/03/2015.		
Spousal Property Order signed and filed on 03/16/2015.		
Reviewed by: LV		
Reviewed on: 03/24/2015		
Updates:		
Recommendation:		
File 9 – Bone		

DOD: 03/18/2013	KRISTA J. GARABEDIAN GRAHAM, daughter, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	40 days since DOD	
Cont. from	No other proceedings	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	I&A - \$145,458.53	
<input checked="" type="checkbox"/> Inventory	Decedent died intestate	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Petitioner requests Court determination that decedent's 100% interest in real property located at 4754 E. Normal Fresno, Ca.; and Fresno County Federal Credit Union checking and savings accounts pass to Krista J. Garabedian Graham pursuant to intestate succession.	
<input type="checkbox"/> Notice of Hrg	n/a	
<input type="checkbox"/> Aff.Mail	n/a	
<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: LV
		Reviewed on: 03/24/2015
		Updates:
		Recommendation: Submitted
		File 10 – Garabedian

Atty Bergstrom, Robert Q. (for Petitioner Tracie Bachman, Successor Trustee)

Petition for Order Confirming Trust Assets

DOD: 6/22/2011		<p>TRACIE BACHMAN, granddaughter and Successor Trustee, is Petitioner.</p> <p>Petitioner states:</p> <ul style="list-style-type: none"> • Petitioner is the presently-acting Successor Trustee of the ESTHER O. TUTTLE 2002 TRUST as Amended in 2005 (copy of Trust and Amendment attached as Exhibits 1 and 2); • In 1982, Esther O. Tuttle (then Esther O. Pearce) recorded an <i>Affidavit – Death of Joint Tenant</i> after the death of her husband and joint tenant, BYRON M. PEARCE, transferring title of real property located on Ashlan Avenue to herself (copy of Affidavit attached as Exhibit 4); • A grant deed transferring title of the real property located on Ashlan to the Trustee of the Trust was inadvertently not prepared by the attorney who prepared the Trust (Declaration of Attorney Robert Q. Bergstrom attached as Exhibit 5); • Petitioner was in constant contact with Decedent up to her death; before her death, Decedent transferred her assets, including real and personal property, to Petitioner as Successor Trustee of the Trust (see Declaration of Tracie Bachman attached as Exhibit 6); • Decedent executed a Last Will and Testament concurrently with execution of the Trust (copy attached as Exhibit 7); Decedent's Will devises all property of her estate, both real and personal, to the Trust; <p align="center">~Please see additional page~</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Paragraph 9 of the <i>Petition</i> states the relationships of the Trust beneficiaries to the Settlor are set forth; however, no relationships are provided. In addition, the <i>Petition</i> does not state whether there are other persons, distinct from persons who are Trust beneficiaries, entitled to notice pursuant to Probate Code §§ 851 and 17203(b), including JOYCE ANN BONGORNO, daughter. If JOYCE ANN BONGORNO is not entitled to notice, the <i>Petition</i> should so state.</p> <p>Note: Exhibit 8 containing the summary of assets which are in the Trust includes the real property APN listed as 460-133-17. However, the attached copies of the grant deeds and the proposed order lists APN 493-112-02. Therefore, it appears the correct APN of the real property is 493-112-02. Proposed order has been interlined at Paragraph 2 to delete the reference to “Exhibit 8” since it contains an incorrect APN (and violates Local Rule 7.6.1 (D)), and a reference to finding Paragraph 2 of the order has been inserted to ensure the real property is accurately described.</p> <p>Reviewed by: LEG</p> <p>Reviewed on: 3/25/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11 – Tuttle</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/O
<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			

Petitioner states, continued:

- Decedent's intent to transfer her assets, both under the terms of her Will and under the terms of her Trust, was consistent and is further evidence of her intent to transfer all of her assets to the Trust;
- Petitioner requests that this Court confirm the real property on Ashlan Avenue and listed in Schedule A attached to the Trust is an asset subject to the Trust and under the control of Petitioner as Successor Trustee;
- Petitioner believes this asset is subject to her control as Successor Trustee under both Paragraph 5 of the Will and Schedule A of the Trust, and on the basis of the demonstrated intent of the Decedent to transfer her assets to the Trust.

Declaration of Attorney Robert Q. Bergstrom attached as Exhibit 5 states it was Decedent's intention to transfer each asset owned by her to the Trust and it was his intention to carry out her wishes; however, he failed to prepare the grant deed and transfer title of the property from the Decedent to the Trust, and he requests the Court to relieve the Trustee from his error.

Declaration of Tracie Bachman attached as Exhibit 6 states:

- She is the Trustee and a Beneficiary under the Trust; the Will of Esther O. Tuttle gives all of Esther's assets to the Trust and names her (misspelled as Tracie Backman) as personal representative of her estate;
- Schedule A attached to the Trust as amended in 2005 lists the real property on Ashlan as being specifically transferred to the Trust; at the time of Esther's death, title to the real property was in the name Esther O. Pearce because that was her name when title was transferred to her in 1982 after the death of her husband, Byron Pearce;
- On 8/2/2011 she signed an Affidavit of death of trustee, returned that document to Attorney Bergstrom on 8/4/2011, and his office submitted the affidavit along with change of ownership report and death certificate to the Recorder's Office on 8/12/2011;
- On 8/2/2011, Attorney Bergstrom also prepared a grant deed transferring title to the real property on Ashlan from Tracie Bachman, Trustee of the Trust, to Tracie Bachman, a single woman;
- She told Mr. Bergstrom's office that she did not want the property held in her name alone; she wanted the name of **DAVID FRISBY** also on the title;
- Mr. Bergstrom prepared a second grant deed transferring title from Tracie Bachman, Trustee of the Trust, to Tracie Bachman and David Frisby as tenants in common (see Exhibit 6(b) attached);
- On 8/2/2011, she told Mr. Bergstrom's office that she did not want to sign the grant deed and she would get back in touch to tell them what he wanted regarding title to the real property;
- On 6/27/2012, she talked to Mr. Bergstrom on the phone and told him she wanted to grant title of the real property located on Ashlan to David Frisby;
- On 7/12/2012, Mr. Bergstrom's office mailed her a grant deed transferring title from Tracie Bachman, Trustee of the Trust, to David Frisby;
- On 7/18/2012, she signed the grant deed and returned it to Mr. Bergstrom's office;
- On 7/30/2012, Mr. Bergstrom's office submitted the grant deed and change of ownership report to the Recorder's Office, which was returned on 8/6/2012 unrecorded by the Recorder's office requesting that "Esther O. Tuttle 2002 Trust, as amended in 2005" be typed above her signature; that was done and the grant deed was submitted again on 8/7/2012; on 8/9/2012, the grant deed was recorded by the Recorder's office, the original deed was mailed to her and a copy was mailed to Mr. Bergstrom's office(see Exhibit 6(c) attached);

~Please see additional page~

Declaration of Tracie Bachman, continued:

- It was not until October 2014 that David Frisby learned that the recording process was not completed because title to the property was never transferred from Esther O. Pearce to her 2002 Trust; David Frisby went to the Recorder's office, requested a copy of the deed and was told the recording process was not completed because the property title was never transferred from Esther O. Pearce to her 2002 Trust (see Exhibit 6(d) attached);
- It is her intention to transfer the real property on Ashlan to David Frisby, and she requests an order of the Court confirming this asset as part of the Esther O. Tuttle 2002 Trust as amended in 2005, and an order granting her permission to transfer title to David Frisby.

Petitioner prays the Court find:

1. The Esther O. Tuttle 2002 Trust as Amended in 2005 is valid;
2. The assets set forth in Exhibit 8 are assets subject to the management and control of Tracie Bachman, as Successor Trustee of the Trust; and
3. As Successor Trustee of the Trust, and as sole named beneficiary, Petitioner Tracie Bachman, may transfer title of the real property located on Ashlan Avenue from Esther O. Pearce to David Frisby as requested in *[the Declaration of Tracie Bachman.]*

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

DOD: 01/23/2015		<p>WANDA JONES, daughter/named executor without bond, is petitioner.</p> <p>Full IAEA – o.k.</p> <p>Will dated: 03/28/2006</p> <p>Residence: Selma Publication: The Selma Enterprise</p> <p>Estimated value of the Estate: Real property - \$200,000.00</p> <p>Probate Referee: Steven Diebert</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of service of the Notice of Petition to Administer Estate on Kevin Pierce pursuant to Probate Code §8110.</p> <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Thursday, 07/30/2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Thursday, 05/26/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit. s/p		
<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. x		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input 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 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: LV			
Reviewed on: 03/24/2015			
Updates: 03/25/2015			
Recommendation:			
File 12 – Dobson			

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

DOD: 01/09/2015		<p>JAMES W. MYERS, son-in-law/named executor without bond, is petitioner.</p> <p>Full IAEA – o.k.</p> <p>Will dated 03/16/1999</p> <p>Residence: Fresno Publication: The Business Journal</p> <p>Estimated value of the Estate Personal property - \$323,000.00</p> <p>Probate Referee: Rick Smith</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need original will to be deposited with the Court pursuant to Probate Code §8200(a)(1).</p> <p>2. Need Letters.</p> <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Thursday, 07/30/2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Thursday, 05/26/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit. s/p		
<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 checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters x		
<input checked="" 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: LV	
		Reviewed on: 03/24/2015	
		Updates:	
		Recommendation:	
		File 13 – Reed	

Probate Status Hearing Re: Failure to File a Final Inventory and Appraisal and for Failure to File a First Account or Petition for Final Distribution

DOD: 10/22/2005	EDWIN L. PYLE was appointed executor with full IAEA and without bond on 7/11/06. Letters issues 7/11/06.	NEEDS/PROBLEMS/COMMENTS: Minute Order dated 10/30/14 states the Court removed Mr. Pyle as Executor and Appoints the Public Administrator. Minute Order dated 1/30/15 (Judge Houry Sanderson) states Examiner notes handed in open court. Mr. Pyle is directed to obtain a corrected inventory and appraisal and file his accounting. Note: On 3-24-15, Mr. Pyle, in pro per, filed a "Corrected Final Inventory and Appraisal" indicating \$0. Attached is a declaration that explains that his mother died virtually penniless. The only the recovered was the coin collection that is no longer in his possession, and even if it was, it would be owed to him due to expenses he incurred. Had his mother lived, she had a good probability of extracting a hefty sum. Mr. Pyle states he appealed a ruling, but ran out of money to fight the suit. The following remain noted for reference: 1. Need corrected final inventory and appraisal and petition for final distribution. 2. Final Inventory and appraisal filed on 8/19/14 shows two different amounts \$1,425.50 and \$1,245.50. In addition the silver coins were not appraised by the probate referee as required. 3. Substitution of attorney has not been filed showing Attorney Daryl Katcher has substituted out of this matter.
Cont. from: 030714, 052314, 072914, 082814, 092514, 103014, 013015	Inventory and appraisal, partial no. 1 was filed on 5/9/07 showing a value of \$54.00. (Note, also listed but not appraised is collectable silver dollar coins and approximately \$45,000 to be received from the A.C. Hiebert Trust.)	
Aff.Sub.Wit.	Inventory and Appraisal, final, filed on 8/19/14 showing a value of \$1,245.00.	
Verified	Notice of Status Hearing was mailed to Attorney Daryl Katcher on 12/20/2013.	
Inventory	Status Report of The Public Administrator filed on 1/19/15 states Deputy Public Administrator Noe Jimenez spoke with Attorney Daryl Katcher who reported that he no longer represented Edwin Pyle. He states that he assisted Mr. Pyle with the final inventory and appraisal as well as the order for closure of this estate.	
PTC	Deputy Jimenez talked with Edwin Pyle, and Mr. Pyle reported that the coins listed on the inventory were part of the Jackson estate, of which the Hiebert Estate was a beneficiary. He reported the Jackson estate administrator, Charles Pyle, had looted the Jackson estate. He reported that he had to seek civil action against Charles Pyle. On 6/26/07, the coins were finally turned over to Daryl Katcher. He reported that by that time he had spent over \$30,000 to obtain the assets. He stated he did file an inventory and appraisal, and he reports that there are no assets left in the estate due to his expenses. Deputy Jimenez asked Edwin Pyle to go to the next hearing and report to the court.	
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: 3/23/15	
	Updates: 3/25/15 (skc)	
	Recommendation:	
	File 14 – Hiebert	

Status Hearing Re: Receipt of Assets from the Estate

	<p>DELIA GONZALEZ, paternal aunt, RAFAEL DE LA MORA MARTIN and MARIA DE JESUS GOMEZ MUNOZ, paternal grandparents were appointed guardians of the person on 10/31/12.</p> <p>DELIA GONZALEZ was appointed guardian of the estate on 10/31/12.</p> <p>Letters issued on 10/31/12.</p> <p>Partial Inventory and appraisal filed on 12/18/12 showing a value of \$117,353.88.</p> <p>1st Account as approved on 6/26/14.</p> <p>This status hearing was set to inform the court of the status of the assets to be received from the estates of the minor's deceased parents Lorena De La Mora and Francisco De La Mora.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p> <p>Note: A Status Hearing for the filing of the final accounting in this guardianship is scheduled for 8/19/15.</p>
Cont. from 120613, 121213, 022114, 050214, 062614, 112014, 012915		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 3/23/15
		Updates:
		Recommendation:
		File 16 – De La Mora

	DELIA GONZALEZ , paternal aunt, RAFAEL DE LA MORA MARTIN and MARIA DE JESUS GOMEZ MUNOZ , paternal grandparents were appointed guardians of the person on 10/31/12 and DELIA GONZALEZ was appointed guardian of the estate. On 08/15/13 OSCAR BARBA and TRISHA BARBA , maternal uncle and aunt, were appointed successor co-guardians of the person. DELIA GONZALEZ continued as guardian of the estate.	NEEDS/PROBLEMS/COMMENTS: 2. Need current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties. Note: A Status Hearing for the filing of the final accounting in this guardianship is scheduled for 8/19/15.
Cont. from 120613, 121213, 022114, 050214, 062614, 112014, 012914	On 10/16/14 the court accepted the resignation of DELIA GONZALEZ as guardian of the estate and appointed OSCAR BARBA and TRISHA BARBA as successor guardians of the estate.	
Aff.Sub.Wit.	On 3/17/15 the Court accepted the resignation of OSCAR BARBA and TRISHA BARBA as co-guardians of the person and appointed HECTOR BARBA as successor guardian of the person. OSCAR BARBA and TRISHA BARBA remain as co-guardians of the estate.	
Verified	Partial Inventory and Appraisal filed on 12/18/12 shows a value of \$117,353.17.	
Inventory	1 st Account as approved on 8/19/14.	
PTC	This status hearing was set to inform the court of the status of the assets to be received from the estates of the minor's deceased parents Lorena De La Mora and Francisco De La Mora.	
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: 3/23/15
		Updates:
		Recommendation:
		File 17 – De La Mora

Probate Status Hearing Re: Filing for Receipt of Blocked Account

	SHAMIKA WILSON , maternal aunt and Guardian of the Person, filed a <i>Petition for Appointment of Guardian of the Estate</i> on 5/29/2014.	NEEDS/PROBLEMS/COMMENTS: Page 18 is the status hearing for the sibling of this ward. Continued from 12/4/2014. Minute Order states counsel requests an additional 90 days. Note: Status Report Regarding Court Order Directing Public Guardian to Establish Blocked CUTMA Account filed 12/11/2014 states Deputy Public Guardian Anita Harper was assigned to this case; she spoke with Ms. Wilson, who reported that she spent all the money on school clothes for the minor, but she has not been able to provide receipts; Ms. Wilson offered to pay back the \$800.00 for both minors; Court may want to consider having Ms. Wilson file a verified declaration stating she spent the money on clothes for the children; Public Guardian does not believe a surcharge is warranted in this case.					
	Minute Order dated 7/17/2014 states the Court orders that Ms. Wilson is authorized to place money into a blocked CUTMA account, per Probate Code § 3900. The Court will sign order to deposit money into blocked account ex parte. Matter continued to 10/2/2014.						
Cont. from 100214, 100914, 120414	Minute Order dated 10/2/2014 [Judge Cardoza] states: No appearances. The Court orders Ms. Wilson to be personally present on 10/9/2014 and to provide receipt of funds placed in blocked account. Matter continued to 10/9/2014.	<table border="1"> <tr><td>Reviewed by: LEG</td></tr> <tr><td>Reviewed on: 3/24/15</td></tr> <tr><td>Updates: 3/25/15</td></tr> <tr><td>Recommendation:</td></tr> <tr><td>File 19 - Muhammad</td></tr> </table>	Reviewed by: LEG	Reviewed on: 3/24/15	Updates: 3/25/15	Recommendation:	File 19 - Muhammad
Reviewed by: LEG							
Reviewed on: 3/24/15							
Updates: 3/25/15							
Recommendation:							
File 19 - Muhammad							
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							

21 Delmer DeArmond (Det Succ)

Case No. 14CEPR01041

Atty DeArmond, Arthur (Pro Per Petitioner)
Atty Coldren, Marie (Pro Per Petitioner)
Atty Clem, Barbara (Pro Per Petitioner)
Atty DeArmond, Don (Pro Per Petitioner)

Amended Petition to Determine Succession to Real Property

DOD: 11-14-02	ARTHUR DE ARMOND , Son, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	40 days since DOD	
	No other proceedings	
<input type="checkbox"/> Aff.Sub.Wit.	I&A: \$80,000.00 (residential real property in Fresno)	
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC	Will dated 10-25-95 devises the property as follows: To Beatrice Parker, friend, a life estate, and upon her death, to Grace De Armond, spouse, if living, and if not living, to the decedent's four children: Marie Coldren, Arthur De Armond, Donnie De Armond, and Barbara Clem.	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w/o	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.	Petitioners state Grace De Armond died 4-7-12 and Beatrice Parker died 10-18-14, and request Court determination that the real property passes to them in 1/4 undivided interests each pursuant to the decedent's will.	
<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: skc
		Reviewed on: 3-24-15
		Updates:
		Recommendation: SUBMITTED
		File 21 – DeArmond

23 Emma A. Springer & Addison E. Springer
 Atty Miller, Lisa Marie (Pro Per – Petitioner – Paternal Aunt)
 Atty McPhetridge, David (Pro Per – Petitioner – Paternal Uncle)

Case No. 15CEPR00267

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

Emma Age 10	<u>Please see petition for details</u>	NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 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 Temporary Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Gary Springer (Father) • Amanda Barnes (Mother) 	
Addison Age: 6			
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 type="checkbox"/> Notice of Hrg			x
<input type="checkbox"/> Aff.Mail			x
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			x
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input 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: LV			
Reviewed on: 03/24/2015			
Updates:			
Recommendation:			
File 23 – Springer			

Petition for Appointment of Temporary Conservator of the Person and Estate

Age: 18	<u>GENERAL HEARING: 04/14/15</u>		NEEDS/PROBLEMS/COMMENTS:
	SHELLY A. PALMER, mother, is Petitioner and requests appointment as Temporary Conservator of the Person with medical consent powers and as Temporary Conservator of the Estate without bond.		<u>CONTINUED FROM 03/19/15</u>
	Declaration of M. Terry Hutchinson, M.D. supports request for medical consent powers.		Court Investigator advised rights on 03/10/15.
Cont. from 0311915	Estimated Value of the Estate:		1. Need proof of service by mail <u>at least 5 court days</u> before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Conservatorship of the Person</i> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for:
Aff.Sub.Wit.	Personal property -\$ 500.00		a. Sabrina Palmer – personal service needed
✓ Verified	Annual income -\$6,600.00 (approximately \$550.00/month)		b. Charles Palmer (father)
Inventory	Petitioner states the proposed conservatee is unable to care for herself and needs assistance will all aspects of daily living. She has no assets other than miscellaneous personal property items valued at approximately \$500.00 and receives social security benefits.		c. Emily Palmer (sister)
PTC	Court Investigator Jennifer Young filed a report on 03/12/15.		d. Jack Palmer (brother)
Not.Cred.			e. Kerry Filgas (maternal grandmother)
✓ Notice of Hrg			f. Sharyn Filgas (maternal grandfather)
✓ Aff.Mail w/			g. Charles Palmer (paternal grandfather)
Aff.Pub.			h. Alexandra Linn (paternal grandmother)
Sp.Ntc.			Note: Proof of Service filed 03/17/15 indicates that notice was mailed to second degree relatives on 03/16/15, only 3 days before the hearing.
Pers.Serv. x			2. Petitioner requests appointment as conservator of the estate without bond. However, effective 1/1/2008, pursuant to CRC 7.207, except as otherwise provided by statute, every conservator or guardian of the estate appointed after 12/31/2007, must furnish a bond, including a reasonable amount for the cost of recovery to collect the bond under Probate Code 2320(c)(4)).
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
✓ CI Report			
9202			
✓ Order			
Aff. Posting			Reviewed by: JF
Status Rpt			Reviewed on: 03/24/15
UCCJEA			Updates:
Citation			Recommendation:
FTB Notice			File 24 – Palmer

Jemma, 5	<u>NO TEMPORARY REQUESTED; COURT ORDERED TEMPORARY LETTERS TO ISSUE ON 03/19/15</u>		NEEDS/PROBLEMS/COMMENTS:
	JACQUELINE LAMB, paternal grandmother, is Petitioner.		This Petition is for Jemma only. Petitioner was previously appointed Guardian of Jeanay on 10/21/14.
Cont. from 031915	Father: BRYAN LAMB – Consent & Waiver of Notice filed 01/15/15		<u>CONTINUED FROM 03/19/15</u> Minute Order from 03/19/15 states: The Court orders temporary letters are to issue to Jacqueline Lamb. Bryan Lamb represents that his father's name is Edward Thomas, but that he has never met him.
<input type="checkbox"/> Aff.Sub.Wit.	Mother: TIFFANY PEREZ – Consent & Waiver of Notice filed 01/15/15		
<input checked="" type="checkbox"/> Verified	Paternal grandfather: EDWARD THOMAS		
<input type="checkbox"/> Inventory	Maternal grandfather: JIMMY PEREZ – Served by mail on 01/29/15		
<input type="checkbox"/> PTC	Maternal grandmother: CARLOTTA MARQUEZ – Served by mail on 01/29/15		
<input type="checkbox"/> Not.Cred.	Siblings: ADRIAN SAINZ-PEREZ (7), MATEO PEREZ (2), BREANN LAMB (6), JEANESSA SILVA (2)		
<input checked="" type="checkbox"/> Notice of Hrg	Petitioner states [see Petition for details].		
<input checked="" type="checkbox"/> Aff.Mail w/	Court Investigator Dina Calvillo filed a report on 03/6/15.		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			1. Need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: a. Edward Thomas Note: Temporary Letters have not been issued.
<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: JF
			Reviewed on: 03/25/15
			Updates:
			Recommendation:
			File 25 – Perez & Lamb

26 Trevor Vasquez (GUARD/P)

Case No. 15CEPR00058

Atty Chavez, Gilbert R., Jr. (Pro Per – Stepfather – Petitioner)

Atty Johns, Dallas (Limited Scope, for Vanessa Marie Vasquez – Mother – Objector)

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

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 3-19-15:</u> Parties have divergent opinions regarding the results of the family law hearing on 3-13-15; continued for the Court's review of the record.</p> <p><u>As of 3-24-15, nothing further has been filed. The following issues remain noted:</u></p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 on: - Trevor Vasquez (14) - Vanessa Vasquez (Mother) 3. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Paternal Grandfather (Ron Berry, Sr.?) - Unknown Maternal Grandfather - Maternal Grandmother Tammy Kelton - Siblings age 12 and older 4. The proposed Order and Letters indicate a different address for Petitioner than the address that was given on the petition. If Petitioner has moved, need change of address filed with the Court. 	
Cont. from 031915				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			X
<input type="checkbox"/>	Aff.Mail			X
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			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 checked="" type="checkbox"/>	Clearances			
<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: skc				
Reviewed on: 3-24-15				
Updates:				
Recommendation:				
File 26 – Vasquez				