

		RHONDA SLATER , Mother and Guardian of the estate, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 4-4-06 through 12-31-12	<u>Note:</u> Minor turned 18 in 2008.
		Accounting: ?? (No schedules)	<p>1. This petition is incomplete and does not contain any summary or schedules, and is therefore not in compliance with applicable Probate Code §§ 2620, 1060 or Cal. Rules of Court 7.575 regarding guardianship accounts. There are no summary, schedules, account statements, etc. Need amended petition with appropriate schedules and statements or waiver from Lars Mommer pursuant to Probate Code §2627.</p> <p>2. Petitioner states she was not informed of the requirement for filing I&A or accountings for the three guardianship estates. However, Petitioner signed the Duties of Guardian and Acknowledgment of Receipt (Form GC-248) on 2-2-06, filed 2-23-06, which outlines the duties of guardians of the estate, including inventory and accounts, and further, was represented by counsel (attorney Janet Wright) when she was appointed. Examiner notes that although the Court at that time did not set status hearings for every required step in every case, it is the <u>fiduciary's</u> duty to be aware of the requirements of the office, and the attorney's duty as counsel, and the requirement of signing and filing of Form GC-248 ensures that awareness.</p> <p>3. I&A filed 2-26-13 states the only asset of the guardianship estate is Lars' interest in the residence; however, the Stipulated Judgment in the family law action 02CEFL04083 appears to award additional assets to the probate estate, and each of the minor children, including the interest in two retirement accounts, proceeds from the sale of two vehicles and a life insurance policy. Need amended I&A or clarification as to the disposition of the other assets.</p> <p>4. Need Notice of Hearing and proof of service of Notice of Hearing at least 15 days prior to the hearing date on all relatives pursuant to Probate Code §1460(b)(5): Lars Mommer, Briana Mommer, Sarah Mommer, Saundra Sowell, Richard Swell, Fred Mommer.</p>
		Beginning POH: \$51,989.00	
		Ending POH: ??	
		Guardian: Not requested	
		Attorney: Not requested	
		Petitioner states the minor's estate consists solely of an 8.887% interest in real property that was the family residence at the time the minor's father passed away (DOD 3-3-04). At the time, the parents were involved in a dissolution proceeding and the Public Administrator was appointed to represent the father's estate in the family law action. On 6-6-08, each of the three minor children was awarded an 8.887% interest in the house, and Petitioner was awarded a 73.33% interest via judgment in the dissolution action. There has never been any cash in the guardianship estate.	
		Petitioner states the house has been a rental and the Court granted Petitioner leave to refinance the existing debt on 12-11-12. That process is still underway.	
		Petitioner states the Public Administrator neglected to present its final account to the Probate Court until just recently, and no deadlines were set for Petitioner to file Inventory and Appraisal or accountings in the three guardianship estate, nor was she informed of the requirement for same.	
		Petitioner requests the Court:	
		<ol style="list-style-type: none"> 1. Approve, allow and settle the account; 2. Authorize and direct Petitioner to deliver the property remaining in her possession to Lars Mommer; and 3. Discharge Petitioner on compliance with this order and filing receipts. 	
<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.		
<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"/>	2620	X	
<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: skc
			Reviewed on: 3-19-13
			Updates:
			Recommendation:
			File 1 - Mommer

DOD: 10/04/06	ELIZABETH BRYAN and CORENE BOPP, Co-Administrators, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 08/05/09 – 02/28/13	
Cont. from	Accounting - \$375,129.65	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$375,000.00	
<input checked="" type="checkbox"/> Verified	Ending POH - \$147,568.73	
<input checked="" type="checkbox"/> Inventory	Administrators - \$8,172.71 (statutory) (\$4,086.35 each)	
<input checked="" type="checkbox"/> PTC	Elizabeth x/o fees - \$3,151.00 (for property clean-up (30.75 hours @ \$20/hr.), sorting through personal property at the residence (78.4 hours @ \$20/hr.), and \$1,000.00 for sale of real property)	
<input checked="" type="checkbox"/> Not.Cred.	Corene x/o fees - \$2,536.00 (for sorting through personal property at the residence (78.4 hours @ \$20/hr.), and \$1,000.00 for sale of real property)	
<input checked="" type="checkbox"/> Notice of Hrg	Attorney - \$5,172.71 (statutory fee less \$3,000.00 authorized in Order for preliminary distribution)	
<input checked="" type="checkbox"/> Aff.Mail w/	Attorney x/o - \$2,488.75 (Per itemization for sale of real property – property was apportioned and 2 sales were conducted. 9.05 hours @ \$275/hr.)	
<input type="checkbox"/> Aff.Pub.	Costs - \$880.50 (for filing fees, certified copies)	
<input type="checkbox"/> Sp.Ntc.	Closing - \$1,500.00	
<input type="checkbox"/> Pers.Serv.	Distribution, pursuant to intestate succession, is to:	
<input type="checkbox"/> Conf. Screen	Corene Bopp - \$17,666.72	
<input type="checkbox"/> Letters 08/18/09	Elizabeth Bryan - \$17,666.72	
<input type="checkbox"/> Duties/Supp	Edwina Hartwig - \$17,666.72	
<input type="checkbox"/> Objections	Carol Goosey - \$17,666.72	
<input type="checkbox"/> Video Receipt	Kathy Jason - \$17,666.72	
<input type="checkbox"/> CI Report	Timothy Schaeffer - \$35,333.44	
<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: JF
		Reviewed on: 03/18/13
		Updates: 03/25/13
		Recommendation:
		File 3 - Schaeffer

Atty Rindlisbacher, Curtis D., of Perkins, Mann & Everett (for Petitioner Teresa Gooding, Administrator)

Atty Durost, Linda K., sole practitioner (for Gloria Maldonado, Beneficiary of the Estate of Thomas Sanchez)

(1) Report of Administrator and (2) Petition for Preliminary Distribution and (3) Partial Allowance of Compensation for Ordinary Services and (4) Reimbursement of Costs (PC 11622, 10810, 10830)

DOD: 9/3/2009		<p>TERESA GOODING, daughter and Administrator appointed on 2/2/2011 with Limited IAEA Authority with funds deposited into a blocked account, is Petitioner.</p> <p>Account period: 9/3/2009 – 9/30/2012</p> <table border="0"> <tr> <td>Accounting</td> <td>-</td> <td>\$92,386.04</td> </tr> <tr> <td>Beginning POH</td> <td>-</td> <td>\$92,328.04</td> </tr> <tr> <td>Ending POH</td> <td>-</td> <td>\$92,328.04</td> </tr> <tr> <td></td> <td></td> <td><i>(\$74,053.04 is cash)</i></td> </tr> <tr> <td>Administrator</td> <td>-</td> <td>\$1,846.56</td> </tr> <tr> <td></td> <td></td> <td><i>(partial fee @ ~%50 of the total \$3,693.13 statutory fee)</i></td> </tr> <tr> <td>Attorney</td> <td>-</td> <td>\$1,846.56</td> </tr> <tr> <td></td> <td></td> <td><i>(partial fee @ ~%50 of the total \$3,693.13 statutory fee)</i></td> </tr> <tr> <td>Costs</td> <td>-</td> <td>\$2,066.90</td> </tr> <tr> <td></td> <td></td> <td><i>(Reimbursement to Petitioner for filing fees, probate referee, publication, certified copies, title company costs of Litigation Guarantee and deed/history copies)</i></td> </tr> </table> <p>Petitioner requests a Court order for preliminary distribution of the estate as follows:</p> <ul style="list-style-type: none"> The estate consists of cash in a blocked account and a 1/3 interest in real property on Clay Avenue in Fresno; The estate is not yet in a condition to be closed because Petitioner has been unable to reach an agreement with the heirs of the ESTATE OF [THOMAS] SANCHEZ [Decedent's spouse, Case 12CEPR00797], who own the other 2/3 interest in the real property; The Order Determining Succession to Real Property [in Case 12CEPR00797] was filed 12/4/2012 [which distributes 1/3 of the real property to Petitioner as personal representative of the instant estate, 1/3 to GLORIA MALDONADO, and 1/3 to ANDREW THOMAS SANCHEZ]; <p align="center">~Please see additional page~</p>	Accounting	-	\$92,386.04	Beginning POH	-	\$92,328.04	Ending POH	-	\$92,328.04			<i>(\$74,053.04 is cash)</i>	Administrator	-	\$1,846.56			<i>(partial fee @ ~%50 of the total \$3,693.13 statutory fee)</i>	Attorney	-	\$1,846.56			<i>(partial fee @ ~%50 of the total \$3,693.13 statutory fee)</i>	Costs	-	\$2,066.90			<i>(Reimbursement to Petitioner for filing fees, probate referee, publication, certified copies, title company costs of Litigation Guarantee and deed/history copies)</i>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. <i>Petition and proposed order refer to Petitioner attempting to reach agreement with the heirs of the Estate of Frank Sanchez; however, based upon Court records, the references should be to the Estate of Thomas Sanchez, Case 12CEPR00797. Proposed order should be revised to state the correct decedent's name.</i></p> <p align="center">~Please see additional page~</p> <p>Reviewed by: LEG</p> <p>Reviewed on: 3/19/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 4 - Sanchez</p>
Accounting	-		\$92,386.04																														
Beginning POH	-		\$92,328.04																														
Ending POH	-		\$92,328.04																														
			<i>(\$74,053.04 is cash)</i>																														
Administrator	-		\$1,846.56																														
			<i>(partial fee @ ~%50 of the total \$3,693.13 statutory fee)</i>																														
Attorney	-		\$1,846.56																														
			<i>(partial fee @ ~%50 of the total \$3,693.13 statutory fee)</i>																														
Costs	-		\$2,066.90																														
			<i>(Reimbursement to Petitioner for filing fees, probate referee, publication, certified copies, title company costs of Litigation Guarantee and deed/history copies)</i>																														
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<input checked="" type="checkbox"/>	Verified																																
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<input type="checkbox"/>	Letters 020311																																
<input type="checkbox"/>	Duties/Supp																																
<input type="checkbox"/>	Objections																																
<input type="checkbox"/>	Video Receipt																																
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<input type="checkbox"/>	9202 ?																																
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<input type="checkbox"/>	FTB Notice																																

Petitioner requests, continued:

- Although the estate is not now in a condition to be closed, Petitioner believes that if a preliminary distribution is granted, the distribution can be made without loss to the creditors or injury to the estate or anyone interested in it; after payment of partial statutory compensation, reimbursement of costs advanced, and the preliminary distribution, there will remain property valued at **~\$47,735.13**;
- Petitioner estimates there will be no taxes, claims or liabilities;
- Only one creditor's claim by Discover for **\$1,093.72** was filed on 5/2/2011, which was rejected by Petitioner on 7/6/2011 on the ground that the account and the charges were unauthorized and not incurred by the Decedent; the deadline for filing a suit on this claim expired on 10/6/2011, and no suit was filed on this claim;
- Petitioner and Petitioner's attorney are entitled to receive **\$1,846.56** as partial allowance (~50%) on the estimated total statutory fee of **\$3,693.13**;
- Each of Decedent's intestate heirs are entitled to an equal distribution from the estate; Pursuant to Probate Code § 11620, Petitioner proposes that **\$40,500.00**, a sum less than 50% of the net value of the estate [*pursuant to Probate Code § 11623*], be ordered released from the blocked account and distributed to Decedent's children as follows:
 - **ROBERT DANIEL FARMER** – **\$6,750.00** cash;
 - **SHARON JUNE FARMER** – **\$6,750.00** cash;
 - **JAMES TERRANCE FARMER** – **\$6,750.00** cash;
 - **TERESA AUGUSTUS GOODING** – **\$6,750.00** cash;
 - **WILLIAM FREDERICK HAPP** – **\$6,750.00** cash;
 - **RICKY VILLANUEVA** – **\$6,750.00** cash.

Petitioner requests the Court order:

- Petitioner be authorized to withdraw from the blocked account the partial allowance of statutory compensation for Petitioner and Petitioner's attorney for services to the estate;
- Petitioner be authorized to withdraw from the blocked account the sum for reimbursement of costs advanced; and
- The preliminary distribution is granted as set forth in the *Petition* and Petitioner is authorized to withdraw from the blocked account the total of **\$40,500.00** payable to the heirs as stated in the *Petition*.

NEEDS/PROBLEMS/COMMENTS, continued:

2. Paragraph 6 of the *Petition* states notice to the Director of California Victim Compensation and Government Claims Board [*pursuant to Probate Code § 9202(b)*] was not required because neither the personal representative nor the estate attorney knows or has reason to believe that an heir is confined in a prison or facility under the jurisdiction of the Department of Corrections [and Rehabilitation] or the Department of the Youth Authority or confined in any county or city jail, road camp, industrial farm, or other local correctional facility. Paragraph 27 of the *Petition* lists Decedent's son, **WILLIAM FREDERICK HAPP**, with an address at a correction institution in Florida, and Paragraph 28 of the *Petition* requests preliminary distribution of **\$6,750.00** cash to Mr. Happ. Need clarification as to whether this heir is confined in a facility under the jurisdiction of the Department of Corrections and Rehabilitation. If Court requires the notice pursuant to Probate Code §§ 216 and 9202(b), the director of the board(s) noted above shall have **four months after notice is received** in which to pursue collection of any outstanding restitution fines or orders.

First and Final Account and Report of Successor Administrator and Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and for Distribution

DOD: 01/07/2011	PUBLIC ADMINISTRATOR , successor administrator, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> At the time the Probate Petition was established the petitioner, Randy Hawkins was granted a Fee Waiver. Pursuant to Probate Code § 11420(1) a fee of \$395 is due. Personal Representative, Randy Hawkins, would be entitled to a portion of the statutory fees pursuant to Probate Code § 10805 and 10814. Order provides for a Bond fee of \$25.34 however the petition states Public Administrator does not request a bond fee.
	Account Period: 11/16/2012 – 01/09/2013	
Cont. from	Accounting - \$80,820.00	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning - \$80,820.00	
<input checked="" type="checkbox"/> Verified	POH - \$80,820.00	
<input checked="" type="checkbox"/> Inventory	Administrator (Statutory) - \$2,432.00	
<input checked="" type="checkbox"/> PTC	X/O - \$248.00 (Per Local Rule for preparation of taxes)	
<input checked="" type="checkbox"/> Not.Cred.	Attorney (Statutory) - \$2,432.00	
<input checked="" type="checkbox"/> Notice of Hrg	Court Costs - \$25.50 (Certified copies)	
<input checked="" type="checkbox"/> Aff.Mail w/	Petitioner states the total commissions, fees, and costs of administration are \$5597.44.	
Aff.Pub.	The beneficiaries have agreed to pay these costs. Upon full payment, petition requests distribution of the assets of the estate, the real property and personal property to the following heirs of the decedent, Randy Hawkins and Chad Hawkins in equal shares.	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters 10/25/11		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting	Petitioner prays for an Order:	
Status Rpt	<ol style="list-style-type: none"> Approving, allowing and settling the first and final account. Authorizing the administrator and attorney fees and commissions. 	
UCCJEA		
Citation		
<input checked="" type="checkbox"/> FTB Notice		

Reviewed by: LV
Reviewed on: 03/18/2013
Updates:
Recommendation:
File 5 - Hawkins

Petition to Terminate Probate Proceedings (Probate Code § 12251)

DOD: 6/25/2008		<p>ROBIN B. SANCHEZ aka ROBIN B. SMITH, daughter and Executor appointed on 10/11/2011, is Petitioner.</p> <p>Petitioner states:</p> <ul style="list-style-type: none"> • <i>Partial #1 Inventory and Appraisal</i> filed on 11/23/2011 shows the following assets: <ol style="list-style-type: none"> 1. Real property in Clovis appraised for \$375,000.00; and 2. Household furniture and furnishings appraised for \$4,000.00; • <i>Final Inventory and Appraisal</i> filed on 1/13/2012 shows the following assets: <ol style="list-style-type: none"> 1. 1969 Rambler appraised for \$30,000.00; 2. 1994 GMC Pickup truck appraised for \$4,000.00; and 3. 1985 Tractor appraised for \$6,000.00. • On 7/5/2012, a Notice of Trustee's Sale was recorded for the Decedent's real property located in Clovis; there was an outstanding loan balance of \$57,317.88 on the property; • On 8/8/2012, a Trustee's Deed Upon Sale (<i>copy attached as Exhibit A</i>) was recorded when the real property was sold; MRO Investments bought the real property for the outstanding balance of the loan, and there was no money due back to the estate; the sale of the real property did <u>not</u> include the personal property; • The household furniture and furnishings, 1969 Rambler, 1994 GMC pick-up and tractor were still on the real property when it sold; the new owner of the real property disposed of the household furniture and furnishings, and sold the two vehicles and tractor; • Petitioner is the sole beneficiary of Decedent's Will dated 4/16/1998; • There is no longer any property of any kind belonging to the estate and subject to administration; Petitioner requests that the probate proceedings be terminated and she be discharged as personal representative of the estate. <p>Petitioner requests that this probate proceeding be terminated and that the personal representative be discharged.</p>	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Note for background: <i>Status Hearing Report</i> filed 12/4/2012 states that in November 2012, MRO as the new owner of the real property listed it for sale with Osborne & Assoc., while the 1969 Rambler and tractor were still on the real property; the real estate agent indicated that the new owner was in the process of transferring the car and tractor to himself as unclaimed property; the agent was informed that the estate had title to this personal property, and the agent was to have the new owner call the Attorney; no call from the owner was received; on 11/26/2012, MRO Investments was sent a letter regarding the estate property; no response was received; Attorney lost contact with the client from early November until early December 2012.</p> <p>Reviewed by: LEG</p> <p>Reviewed on: 3/18/13</p> <p>Updates:</p> <p>Recommendation: File 6 - Smith</p>	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input 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			

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

Age: 63	<u>TEMPORARY EXPIRES 03/27/13</u>		<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Court Investigator Advised Rights on 03/11/2013.</p> <p>Voting Rights Affected Need Minute Order.</p> <ol style="list-style-type: none"> 1. Need Dementia Attachment, Judicial Council Form GC-313, to the petition. 2. Dr. Patel did not date signature throughout the Capacity Declaration. 3. #5a and b of the Capacity Declaration was not answered regarding whether the proposed conservatee is able to attend the hearing. 4. Bond only needed for personal property and annual income. Petition does not indicate any annual income. Need estimate of any annual income and personal property in order to determine bond.
	<p>BEVERLY ANN HALL, sister, is petitioner and requests appointment as Conservator of the Person, with medical consent and dementia powers to administer dementia medications, and Conservator of the Estate with bond set at \$182,600.00.</p>		
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	w/		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input checked="" type="checkbox"/> Pers.Serv.			
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input checked="" 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 type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
<p>Declaration of Surendra Patel.</p> <p>Estimated Value of the Estate: Real Property - \$190,000.00</p> <p>Petitioner states that Christine has been diagnosed with Alzheimer's such that requires total care and assistance for her health, food, clothing and shelter needs. She is unable to cook or plan meals. She does not comprehend any advice a doctor may communicate and cannot on her own maintain any medical regimen. She always needs assistance for clothing, dressing, bathing and hygiene.</p> <p>Christine came to live with Petitioner approximately 2 years ago because Christine's husband was experiencing health problems and was no longer able to care for her. Petitioner has been acting under a health care power of attorney and is the payee for Christine's benefits. Conservatorship is now necessary because Christine's husband, Arthur Dhooghe, passed away unexpectedly and his brother is handling the estate. The brother and his attorney have both contacted Petitioner regarding distributing Arthur's estate, but have failed to provide Petitioner with a copy of Arthur's will. Petitioner has refused to make any commitments or entertain any proposed agreements without receiving additional information about Arthur's estate or having legal authority to act on Christine's behalf. Petitioner seeks conservatorship, for the purposes of receiving information and assessing the interests of Christine in Arthur's estate.</p> <p>Court Investigator Jo Ann Morris' report filed 03/11/2013.</p>			
			<p>Reviewed by: LV</p> <p>Reviewed on: 03/20/2013</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 8 - Dhooghe</p>

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

DOD: 03/09/2013		<u>TEMPORARY EXPIRES 03/27/2013</u>		NEEDS/PROBLEMS/COMMENTS:					
		<p>LYDIA M. KING, Spouse, is petitioner and was appointed Temporary Conservator of the Person and Estate with bond of \$87,340.00 on 03/06/2013.</p>		<p><u>Proposed Conservatee passed away on 03/09/2013.</u></p> <p>Note: A status hearing will be set as follows:</p> <ul style="list-style-type: none"> • Friday, 06/07/2013 at 9:00am in Dept. 303 for the filing of the Final Temporary Conservatorship Account pursuant to Probate Code §2256. <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.								
<input type="checkbox"/>	Verified								
<input type="checkbox"/>	Inventory								
<input type="checkbox"/>	PTC								
<input type="checkbox"/>	Not.Cred.								
<input type="checkbox"/>	Notice of Hrg								
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<input type="checkbox"/>	Pers.Serv.								
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<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 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: 03/18/2013	
								Updates:	
								Recommendation:	
				File 9 - King					

Petition for Termination of Guardianship

Age: 12 years		ALAN MALONEY, Guardian, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Petition does not list the names and current addresses of the mother, paternal grandmother and maternal grandfather. Need Notice of Hearing. Need proof of service of the Notice of Hearing on: <ol style="list-style-type: none"> Philip Replogle (father) Amanda Barnes (mother) Diane Fitzhenry-Caughill (paternal grandmother) Randy Barnes (maternal grandfather)
		ALAN MALONEY, maternal step-grandfather, was appointed guardian on 10/31/2011.	
Cont. from		Father: PHILIP REPLOGLE	
<input type="checkbox"/>	Aff.Sub.Wit.	Mother: NOT LISTED (AMANDA BARNES)	
<input checked="" type="checkbox"/>	Verified	Paternal grandfather: Deceased	
<input type="checkbox"/>	Inventory	Paternal grandmother: Not listed (Diane Fitzhenry-Caughill)	
<input type="checkbox"/>	PTC	Maternal grandfather: Not listed (Randy Barnes)	
<input type="checkbox"/>	Not.Cred.	Maternal grandmother: Not listed.	
<input type="checkbox"/>	Notice of Hrg	Petitioner states the minor's father is now able to care for him. Guardian's health is failing and he cannot provide the level of care for the minor.	
<input type="checkbox"/>	Aff.Mail	Court Investigator Jennifer Young's Report filed on 3/20/13.	
<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 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 type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 3/19/13
			Updates: 3/25/13
			Recommendation:
			File 11 - Replogle

Atty Flores, Marisol (pro per Petitioner/mother)

Atty Flores, Alma R (pro per Guardian)

Petition for Termination of Guardianship

Teddy age: 18	<p>MARISOL FLORES, mother, is petitioner.</p> <p>ALMA FLORES, maternal grandmother, was appointed as guardian on 11/29/2011. – Consents and waives notice.</p> <p>Father: ANGEL RANGEL</p> <p>Paternal grandparents: Not listed Maternal grandfather: Deceased.</p> <p>Petitioner states on 12/29/2012 Social Worker Staci Moffatt and Officer Coleman placed the children in her home. Her home was assessed and approved.</p> <p>Court Investigator Charlotte Bien's Report filed 3/21/13</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Teddy has reached the age of majority therefore guardianship of her has terminated by operation of law.</p> <ol style="list-style-type: none"> Petition does not include the current addresses of the father. Petition does not include the names and addressed of the paternal grandparents. Need Notice of Hearing. Need proof of service of the Notice of Hearing on: <ol style="list-style-type: none"> Angel Rangel (father) Teddy Gerard (former minor) Edward Gerard (minor) Paternal grandparents 	
Edward age: 16			
Jacob age: 10			
Jayden age: 7			
Cont. from			
Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			X
Aff.Mail			X
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
<input checked="" type="checkbox"/> CI Report			
9202			
<input checked="" type="checkbox"/> Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: KT	
		Reviewed on: 3/19/13	
		Updates: 3/21/13	
		Recommendation:	
		File 12 – Gerard & Rangel	

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

DOD: 6-5-05		ROSANNA SORIA , Spouse, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need Inventory and Appraisal showing the value of the property \$150,000.00 or less pursuant to # 8 of the petition and Probate Code §13150 et seq. (The I&A attached to the petition is incomplete.) 2. Need Notice of Hearing. 3. Need proof of service at least 15 days prior to the hearing per Probate Code §§ 13153, 1220 on: - Robert J. Soria (son) - Yvonne Soria (daughter) - Steve Soria (son) 4. Order.
		40 days since DOD	
		No other proceedings	
		I&A: <i>Need I&A</i>	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory	X Will dated 4-9-93 devises the decedent's estate (personal property, residence, residue) to Petitioner.	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	X Petitioner requests Court determination that Decedent's 1/3 interest in real property located at 21415 E. Manning Ave., Reedley, passes to her pursuant to Decedent's will.	
<input type="checkbox"/>	Aff.Mail	X	
<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 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: skc
			Reviewed on: 3-19-13
			Updates:
			Recommendation:
			File 13 - Soria

