



## ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Attorney Heather H. Kruthers (for Petitioner Public Guardian)

**Fourth Account Current and Report of Conservator and Petition for Allowance of Compensation to Conservator and Attorney**

		<b>PUBLIC GUARDIAN</b> , Conservator of the Estate, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> If the <i>Petition</i> is granted, Court will set a status hearing as follows:</p> <ul style="list-style-type: none"> <li>• <b>Thursday, March 1, 2018, at 9:00 a.m. in Dept. 303</b> for filing of the fifth account.</li> </ul> <p>Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the date listed, the hearing will be taken off calendar and no appearance will be required.</p>
		<b>Account period: 8/1/2013 – 12/31/2015</b>	
Cont. from		Accounting - <b>\$2,172,900.29</b>	
Aff.Sub.Wit.		Beginning POH - <b>\$1,982,272.80</b>	
✓	Verified	Ending POH - <b>\$1,991,354.83</b> (\$222,147.62 is cash)	
	Inventory	Conservator - <b>\$3,502.40</b> (15.90 Deputy hours @ \$96/hr and 26.0 Staff hours @ \$76/hr)	
	PTC		
	Not.Cred.		
✓	Notice of Hrg	Attorney - <b>\$1,500.00</b> (less than \$2,500.00 per Local Rule)	
✓	Aff.Mail	W/	
	Aff.Pub.	Bond fee - <b>\$12,202.91</b> (OK)	
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	2620		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		<b>Reviewed by:</b> LEG	
		<b>Reviewed on:</b> 3/21/16	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 1- Amelino</b>	

Guardian Bradshaw, Alicia Ann (pro per – maternal great-aunt)  
 Petitioner Salvador, Krystal (pro per – Petitioner)

Petition for Termination of Guardianship

		<p><b>KRYSTAL SALVADOR</b>, mother, is Petitioner.</p> <p align="center">~Please see Petition for details~</p> <p>Court Investigator filed a report on 11/06/15.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 1/25/2016.</b> Minute Order states Ms. Salvador requests a continuance due to the Guardian's pregnancy.</p> <p><b>The following defects from the last hearing remain:</b></p> <ol style="list-style-type: none"> <li>1. Need Notice of Hearing.</li> <li>2. Need proof of service by mail at least 15 days before the hearing of <u>Notice of Hearing</u> or Consent &amp; Waiver of Notice or Declaration of Due Diligence for:                             <ol style="list-style-type: none"> <li>a. Alicia Ann Bradshaw (guardian)</li> <li>b. Mark Thompson, Jr. (father)</li> <li>c. Mark Thompson, Sr. (paternal grandfather)</li> <li>d. Paternal grandmother (unknown)</li> </ol> </li> </ol>	
Cont. from 111615, 012516				
<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 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><b>Reviewed by:</b> JF / LEG</p> <p><b>Reviewed on:</b> 3/21/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 2 – Salvador</b></p>		



**Petitioner Carmela DeSantis' Status Report filed by Attorney Joseph Marchini on 3/18/2016 states:**

- Petitioner has several pending petitions and several objections to trustee accountings pending before the court in this matter [*list of petitions and objections omitted*];
- The trustees have provided, but not filed with the Court, accountings for 2012 (fourth account current), 2013 (fifth account current), and 2014 (sixth account current); Petitioner is reviewing these for possible objection.
- Petitioner has deposed numerous produce buyers who engaged in transactions posted to the first and second accountings; the depositions of the accountants who prepared the accounts are still to be taken;
- **Open discovery:** Petitioner has deposed numerous produce buyers who engaged in transactions posted to the first and second accountings; the depositions of the accountants who prepared the accountings are still to be taken;
- **Petition to Construe:** This petition was severed from other matters for separate trial in the belief that the resolution of this matter might streamline litigation of the others;
- On 8/4/2014, the Court issued its *Statement of Decision*; the Appeal has been heard, and the trial court's judgment affirmed.
- **Future Litigation:** Counsel for Trustee Nick Verni and counsel for Mrs. DeSantis have begun very general discussions regarding which matters remained to be tried and how this matter might be resolved short of trial; Mrs. DeSantis requires that this matter be continued for **90 days** so that these discussions may be completed.

**Trustee [Nicola Verni's] Status Report filed by Attorney Timothy L. Thompson on 3/18/2016 states:**

- On 9/22/2014, after trial in this matter held before the Honorable Robert H. Oliver, judgment was entered in favor of the Trustees as to the *Petition to Construe Trust Provisions*;
- A *Notice of Appeal* was filed by Petitioner, Carmela DeSantis, on 1/23/2015;
- The parties submitted their respective briefs, oral argument was held on 1/25/2016, and on 1/27/2016, the Appellate Court issued its Opinion affirming the judgment and awarding costs on appeal to the Respondent Trustees;
- Petitioner DeSantis' opportunities to petition the District Court of Appeal for rehearing or reconsideration or to petition the Supreme Court for review have expired and the Appellate Court's remittitur is expected to be issued within the next 30 days;
- The remaining issues in this matter include the *Petition to Remove Trustees; Appoint Receiver; Surcharge Trustees; Deny Trustees Compensation; Impose Constructive Trust on Assets; and Cause Proceedings to Trace and Recover Assets*; the ruling in favor of Trustees on the trust interpretation issue has removed the necessity to trace and recover *inter-vivos* gifts and potentially resolves some of the remaining accounting issues;
- During the pendency of the appeal, there has been no discovery conducted or discussion between the parties to attempt to resolve the remaining issues;
- Following the Appellate Court's Decision, he [Attorney Thompson] has spoken to opposing counsel Mr. Marchini, and based upon those discussions he is optimistic that the parties will be able to discuss a resolution of the remaining issues without further litigation;
- We are in the process of gathering information regarding the value of certain assets in the trust which need to be distributed pursuant to the trust terms; primarily, this will involve obtaining appraisals of real property; once those values are obtained, they intend to work with opposing counsel and the other parties to resolve the remaining issues;
- They request this matter be continued for a further Case Management Conference for at least **90 days** to allow the parties to conduct the necessary work and discussions to see if the matter can be resolved.

**Attorney** Joseph Marchini; J. Jackson Waste; of Baker Manock & Jensen (for Petitioner Carmela DeSantis, daughter and Trust Beneficiary)

**Attorney** Kenneth Baldwin; Timothy Thompson; Nikole Cunningham; of McCormick Barstow (for Co-Trustee Nicola "Nick" Verni, son)

**Attorney** L. Kim Aguirre, of Gromis & Aguirre (for Co-Trustee Antonietta "Rosa" Verni, daughter)

**Attorney** John Phillips; of Wild, Carter & Tipton (for Leonard "Dino" Verni, son)

**Attorney** Jeffrey Bohn, sole practitioner (for Erlinda M. Verni, surviving spouse)

**Petition to:** (1) Remove Trustees; (2) Appoint Receiver; (3) Surcharge Trustees; (4) Deny Trustees Compensation; (5) Impose Constructive Trust on Assets; and (6) Cause Proceedings to Trace and Recover Assets [Prob. C. 15642, 16420 & 17200]

Leonarda DOD: 7/31/2000	<b>CARMELA DeSANTIS</b> , daughter and Trust Beneficiary, is Petitioner. <b>Petitioner states:</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
Saverio DOD: 5/25/2009	<ul style="list-style-type: none"> <li>The <b>VERNI FAMILY TRUST of 1999</b> was created by <b>SAVERIO VERNI</b> and <b>LEONARDA VERNI</b> on 6/10/1999, and was amended once by Settlor on the following day, 6/11/1999; Leonarda died on 7/31/2000, thereby causing the Trust to be divided into three sub-trusts: the <b>VERNI MARITAL TRUST</b>, the <b>VERNI FAMILY TRUST</b>, (which was amended once during both Trustors' lifetimes), and the <b>VERNI SURVIVOR'S TRUST</b> (copies of Trusts attached as Exhibit A); following Leonarda's death, Saverio amended the <b>SURVIVOR'S TRUST</b> seven times, with the <i>Eighth Amendment</i> (the final) amending the <b>SURVIVOR'S TRUST</b> in its entirety;</li> </ul>	<b>Continued from 11/30/2015.</b>
	<ul style="list-style-type: none"> <li>Saverio served as sole trustee of the three sub-trusts until his death on 5/25/2009, and upon his death the Marital Sub-Trust terminated and its principal was added to the Family sub-trust, which became the <b>MERGED FAMILY SUB-TRUST</b>;</li> </ul>	<b>Note:</b> Additional notes pages originally prepared with respect to this petition have been omitted.
Cont. from 091112, 100212, 120512, 010313, 022113, 032213, 052413, 062113, 062813, 083013, 092713, 103013, 120613, 012714, 032114, 053014, 080414, 091514, 031615, 062215, 081715, 113015	<ul style="list-style-type: none"> <li>Pursuant to the Trust terms, <b>ANTONIETTA ROSA VERNI</b>, daughter, is first appointed and currently serves as Successor Trustee of the Merged Family Sub-Trust; pursuant to the <i>Eighth Amendment</i> to Trust, <b>NICOLA VERNI</b>, son, is first appointed and currently serves as Successor Trustee of the <b>SURVIVOR'S TRUST</b>;</li> </ul>	
Aff.Sub.W	<ul style="list-style-type: none"> <li>The beneficiaries of each of the Sub-Trusts are the Settlor's five children: <b>ANTONIETTA ROSA VERNI (Rosa)</b>, <b>NICOLA VERNI (Nick)</b>, <b>LEONARD VERNI (Dino)</b>, <b>MARIA STANZIALE</b>, and <b>CARMELA DeSANTIS</b> (Petitioner); and specific distributions from the Survivor's Sub-Trust are to <b>ERLINDA MARCIANO VERNI (\$200,000.00)</b> and <b>ST. ANTHONY OF PADUA CATHOLIC CHURCH (\$200,000.00)</b>;</li> </ul>	
✓ Verified	<ul style="list-style-type: none"> <li>Following the death of Saverio and Leonarda, the Merged Family Sub-Trust names Rosa as First Successor Appointee, and Maria as Second Successor Appointee; Eighth Amendment provides that upon Saverio's ceasing to act as trustee, Nick will serve as trustee of the Survivor's Sub-Trust;</li> </ul>	
Inventory	<ul style="list-style-type: none"> <li><b>Petitioner seeks a Court order pursuant to Probate Code § 15642 removing Rosa as trustee of the Merged Family Sub-Trust, and removing Nick as trustee of the Survivor's Sub-Trust; Petitioner also seeks a determination by the Court that Dino is not qualified to serve as next successor trustee of the Survivor's Sub-Trust.</b></li> </ul>	
PTC		
Not.Cred.		
Notice of Hrg	X	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
✓ Pers.Serv.		
Conf. Screen		
Letters		
Duties/S		
Objection		
Video Receipt		
CI Report		
9202		
✓ Order		
Aff. Post		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LEG
		Reviewed on: 3/21/16
		Updates:
		Recommendation
		File 3B – Verni

**3C In the Matter of the Verni Family Trust (Trust)**

**Case No. 10CEPR00639**

**Attorney** Joseph Marchini; J. Jackson Waste; of Baker Manock & Jensen (for Petitioner Carmela DeSantis, daughter and Trust Beneficiary)

**Attorney** Kenneth Baldwin; Timothy Thompson; Nikole Cunningham; of McCormick Barstow (for Co-Trustee Nicola "Nick" Verni, son)

**Attorney** L. Kim Aguirre, of Gromis & Aguirre (for Co-Trustee Antonietta "Rosa" Verni, daughter)

**Attorney** John Phillips; of Wild, Carter & Tipton (for Leonard "Dino" Verni, son)

**Attorney** Jeffrey Bohn, sole practitioner (for Erlinda M. Verni, surviving spouse)

**Petition to Construe Trust Provision [Prob. C. 17200]**

Leonarda DOD: 7/31/2000	<p><b>CARMELA DeSANTIS</b>, daughter and Trust Beneficiary, is Petitioner. <b>Petitioner states:</b></p> <ul style="list-style-type: none"> <li>The <b>VERNI FAMILY TRUST of 1999</b> was created by <b>SAVERIO VERNI</b> and <b>LEONARDA VERNI</b> on 6/10/1999, and was amended once by Settlers on the following day, 6/11/1999; Leonarda died on 7/31/2000, thereby causing the Trust to be divided into three sub-trusts: the <b>VERNI MARITAL TRUST</b>, the <b>VERNI FAMILY TRUST</b>, (which was amended once during both Trustors' lifetimes), and the <b>VERNI SURVIVOR'S TRUST</b> (copies of Trusts attached as Exhibit A);</li> <li>The instant petition relates to a provision contained in the <b>SURVIVOR'S SUB-TRUST</b>; over Petitioner's objections, Trustees Nick and Rosa have provided a commingled accounting for the Merged Family and Survivor's Sub-Trusts, which fails to segregate each Sub-Trust's assets, liabilities, receipts and disbursements;</li> <li>The failure to appropriately segregate assets, liabilities, receipts and disbursements among the Sub-Trusts prevents the Court, trustee and beneficiaries from determining the size and holdings of the <b>SURVIVOR'S SUB-TRUST</b>; because the <b>SURVIVOR'S SUB-TRUST</b> will be used to fund the above-referenced equalization provision, any appropriate increase in size to that particular Sub-Trust will allow greater realization of the Trustor's intent and will provide a means for effectuating the equalization of prior distributions; conversely, any inappropriate decrease in the size of the <b>SURVIVOR'S SUB-TRUST</b> will undermine the Trustor's intent and deny the Trustee the ability to effectuate an equalization;</li> <li><b>The Trustee of the SURVIVOR'S SUB-TRUST believes that distributions made during Saverio's lifetime should not be considered for purposes of the equalization process; Petitioner believes this to be contrary to the language of the provision and intent of the Trustor.</b></li> <li><b>Petitioner requests a judicial declaration from the Court concerning the proper construction of Subsection 1, of Section B, or Article IV of the SURVIVOR'S SUB-TRUST [refer to copy of Trust or Paragraph 11 of Petition for exact language requiring apportionment of the residue of the trust estate into equal shares for Trustor's living children.]</b></li> </ul>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
Saverio DOD: 5/25/2009		<b>Continued from 11/30/2015.</b>
Cont. from 100212, 120512, 010313, 022113, 032213, 052413, 062113, 062813, 083013, 092713, 103013, 120613, 012714, 032114, 053014, 080414, 091514, 031615, 062215, 081715, 113015		<b>Note:</b> Additional notes pages originally prepared with respect to this petition have been omitted.
Aff.Sub.W		
✓ Verified		
Inventory		
PTC		
Not.Cred.		
✓ Notc Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
✓ Pers.Serv.		
Conf. Screen		
Letters		
Duties/S		
Objectn		
Video Receipt		
CI Report		
9202		
✓ Order		
Aff. Post		
Status Rpt		
UCCJEA		
Citation		
FTB Notc		
		<b>Reviewed by:</b> LEG
		<b>Reviewed on:</b> 3/21/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 3C – Verni</b>

**3D In the Matter of the Verni Family Trust (Trust)**

**Case No. 10CEPR00639**

**Attorney Joseph Marchini; J. Jackson Waste; of Baker Manock & Jensen (for Petitioner Carmela DeSantis, daughter and Trust Beneficiary)**

**Attorney Kenneth Baldwin; Timothy Thompson; Nikole Cunningham; of McCormick Barstow (for Co-Trustee Nicola "Nick" Verni, son)**

**Attorney L. Kim Aguirre, of Gromis & Aguirre (for Co-Trustee Antonietta "Rosa" Verni, daughter)**

**Attorney John Phillips; of Wild, Carter & Tipton (for Leonard "Dino" Verni, son)**

**Attorney Jeffrey Bohn, sole practitioner (for Erlinda M. Verni, surviving spouse)**

**Petition to Establish Claim of Ownership, in Favor of Trust, to Property and for Order Directing its Transfer to the Trustees to Hold in Trust (Prob. C. 850, 17200.1)**

<p><b>Leonarda DOD:</b> 7/31/2000</p> <hr/> <p><b>Saverio DOD:</b> 5/25/2009</p> <hr/> <p>Cont. from 100212, 120512, 010313, 022113, 032213, 062113, 062813, 083013, 092713, 103013, 120613, 012714, 032114, 053014, 080414, 031615, 062215, 081715, 113015</p> <hr/> <p><input type="checkbox"/> <b>Aff.Sub.W</b></p> <hr/> <p><input checked="" type="checkbox"/> <b>Verified</b></p> <hr/> <p><input type="checkbox"/> <b>Inventory</b></p> <hr/> <p><input type="checkbox"/> <b>PTC</b></p> <hr/> <p><input type="checkbox"/> <b>Not.Cred.</b></p> <hr/> <p><input type="checkbox"/> <b>Notice of Hrg</b></p> <hr/> <p><input type="checkbox"/> <b>Aff.Mail</b></p> <hr/> <p><input type="checkbox"/> <b>Aff.Pub.</b></p> <hr/> <p><input type="checkbox"/> <b>Sp.Ntc.</b></p> <hr/> <p><input checked="" type="checkbox"/> <b>Pers.Serv.</b></p> <hr/> <p><input type="checkbox"/> <b>Conf. Screen</b></p> <hr/> <p><input type="checkbox"/> <b>Letters</b></p> <hr/> <p><input type="checkbox"/> <b>Duties/S</b></p> <hr/> <p><input type="checkbox"/> <b>Objection</b></p> <hr/> <p><input type="checkbox"/> <b>Video Receipt</b></p> <hr/> <p><input type="checkbox"/> <b>CI Report</b></p> <hr/> <p><input type="checkbox"/> <b>9202</b></p> <hr/> <p><input checked="" type="checkbox"/> <b>Order</b></p> <hr/> <p><input type="checkbox"/> <b>Aff. Post</b></p> <hr/> <p><input type="checkbox"/> <b>Status Rpt</b></p> <hr/> <p><input type="checkbox"/> <b>UCCJEA</b></p> <hr/> <p><input type="checkbox"/> <b>Citation</b></p> <hr/> <p><input type="checkbox"/> <b>FTB Notice</b></p>	<p><b>CARMELA DeSANTIS</b>, daughter and Trust Beneficiary, is Petitioner.</p> <p><b>Summary of Petitioner's requests for specific relief:</b></p> <ol style="list-style-type: none"> <li>1. Determining that the following is property of the Trust estate:             <ol style="list-style-type: none"> <li>(a) <b>Almond crops:</b> (i) The almond meat inventory on hand at the date of Saverio's death; (ii) all almond crops grown on Trust land since Saverio's death; and (iii) proceeds from the sale of the almond inventory and crops;</li> <li>(b) <b>Olive crops:</b> (i) The olive oil, olive crop and olive inventory on hand at the date of Saverio's death; (ii) all olive crops grown on Trust land since Saverio's death; and (iii) proceeds from the sale of the olive oil, inventory and crops;</li> <li>(c) <b>Other crops (Stone Fruit, Grapes, Etc.):</b> (i) The inventory of other crop grown on Trust land, on hand at the time of Saverio's death but not reported in the Trustee's First Account; (ii) all such crops grown on Trust land since Saverio's death and during 2009; and (iii) proceeds from the sale of the inventory and crops;</li> <li>(d) <b>Other Inventory on Hand:</b> (i) The inventory of firewood and olive oil on hand at the time of Saverio's death but not reported in the Trustee's First Account; (ii) all such items produced from products grown on Trust land since Saverio's death and during 2009; [and (iii) proceeds from the sale of the other inventory;]</li> <li>(e) <b>Proceeds from Sale of Trust Real Property:</b> The money received by Nick and Dino from DeYoung Properties in connection with the option to purchase land and used by DeYoung Properties to actually purchase Trust land which sum is believed to be not less than <b>\$1,000,000.00</b>;</li> </ol> </li> <li>2. Directing each of the beneficiaries in possession or holding the property to transfer such property to the Trustees to hold for the benefit of the Trust and the appropriate Sub-Trust(s);</li> <li>3. Directing each of the beneficiaries in possession or holding any proceeds from the sale or exchange of any of the property to transfer such proceeds to the Trustees to hold for the benefit of the Trust and the appropriate Sub-Trust(s);</li> <li>4. For judgment in favor of the Trustees of the Trust against any beneficiary who received the Trust property and proceeds, in an amount to be determined and as required to compensate for all of the detriment and damages cause to the Trust; and</li> <li>5. For treble damages pursuant to Probate Code § 859.</li> </ol>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 11/30/2015.</b></p> <p><b>Note:</b> Additional notes pages originally prepared with respect to this petition have been omitted.</p> <hr/> <p><b>Reviewed by:</b> LEG</p> <hr/> <p><b>Reviewed on:</b> 3/21/16</p> <hr/> <p><b>Updates:</b></p> <hr/> <p><b>Recommendation:</b></p> <hr/> <p><b>File 3D - Verni</b></p>
--	---	--

Attorney Joseph Marchini; J. Jackson Waste; of Baker Manock & Jensen (for Petitioner Carmela DeSantis, daughter and Trust Beneficiary)  
 Attorney Kenneth Baldwin; Timothy Thompson; Nikole Cunningham; of McCormick Barstow (for Co-Trustee Nicola "Nick" Verni, son)  
 Attorney L. Kim Aguirre, of Gromis & Aguirre (for Co-Trustee Antonietta "Rosa" Verni, daughter)  
 Attorney John Phillips; of Wild, Carter & Tipton (for Leonard "Dino" Verni, son)  
 Attorney Jeffrey Bohn, sole practitioner (for Erlinda M. Verni, surviving spouse)

**Petition for Review of Accounts and Acts of Trustees [Prob. C. 16063(a)(5); 17200(b)(5)]**

Leonarda DOD: 7/31/2000	<p><b>CARMELA DeSANTIS</b>, daughter and Trust Beneficiary, is Petitioner.</p> <p><b>Summary of Petitioner's requests in the Prayer for Relief:</b></p> <ul style="list-style-type: none"> <li>That each of the Second, Third, and Fourth Accounts Current submitted to Petitioner by the Co-Trustees be disallowed;</li> <li>That the Co-Trustees, and each of them, be ordered to compensate the estate for any loss caused by their acts and omissions;</li> <li>That the Trustees be directed to prepare and file a true and full account of their acts and proceedings within such time as may be allowed by this Court; and</li> <li>That Petitioner be reimbursed attorney's fees and costs.</li> </ul> <p><b>Petitioner states the following in support of the requests for relief:</b></p> <p><b>Accounts Provided by the Trustees</b></p> <ul style="list-style-type: none"> <li>On or about 8/26/2010, the Co-Trustees, Rosa and Nick Verni, filed a <i>First Account Current and Report of Trustees and Petition for its Settlement</i>;</li> <li>On 10/5/2010, Petitioner filed written objections to the <i>First Account Current</i> based on, among other things, the limited scope of the Account, the Trustees' failure to render separate accountings for each Sub-Trust, the failure to provide information pertaining to transactions involving the Trustees, as well as with respect to various farming operations being managed by the Trustees on behalf of the Trust;</li> <li>At Petitioner's request, the Trustees provided Petitioner with a <i>Second Account Current</i>, covering the period of 1/1/2010 through 12/31/2010.</li> </ul> <p style="text-align: center;">~Please see additional page~</p>	<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <p><u>Continued from 11/30/2015.</u></p> <p><b>Note:</b> Petitioner requests the Court review and disallow the Second, Third and Fourth Accounts. Because the subject accounts are attachments by Petitioner and have not been duly filed with the Court by the Co-Trustees as the fiduciaries, the accounts have not been reviewed by the Court.</p>
Saverio DOD: 5/25/2009		
Cont. from 120613, 012714, 032114, 053014, 080414, 091514, 031615, 062215, 081715, 113015		
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 X		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 3/21/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 3E - Verni</b></p>

**Petitioner states, continued:**

- On 7/26/2012, Petitioner filed written *Objections to Second Account Current*, and attached a copy of the *Second Account Current (copy of the Objections to Second Account Current filed by Petitioner on 7/26/2012 attached as Exhibit B)*;
- The *Second Account Current* continued to be deficient in the same respects as noted with respect to the *First Account Current*, among others;
- In spite of Petitioner's repeated objections, the Trustees continue to fail to properly account to Petitioner and other beneficiaries, as required by the terms of the Trust and Probate Code § 16062 et seq., in the *Third Account Current*, covering the period of 1/1/2011 through 12/31/2011, mailed to Petitioner at her request on or about 11/19/2012, and the *Fourth Account Current* covering the period of 1/1/2012 through 12/31/2012, mailed to Petitioner at her request on or about 4/19/2013;
- The manner in which such Accounts are deficient is further described in Petitioner's *Objections to Third Account Current*, attached as *Exhibit C*, and Petitioner's *Objections to Fourth Account Current* attached as *Exhibit D*;
- Article 11, Section 4 of the Trust requires the Trustees to render an accounting upon written request of any beneficiary;
- To date, the Trustees have failed to provide adequate accounts in response to Petitioner's requests pursuant to this provision, thereby necessitating this request that the Court review the Second, Third and Fourth Accounts Current and the acts of the Trustees.

**Response to Petition for Review of Accounts and Acts of Trustees filed on 12/5/2013 by Trustees Nick Verni and Rosa Verni states:**

- Trustees admit that they filed the First Account Current and Report of Trustees and Petition for Settlement on 8/26/2010; Trustees further admit that Petitioner filed written objections to the First Account Current on 10/5/2010; however, Trustees deny that any deficiencies exist, legal or otherwise, in the First Account Current;
- Trustees admit that they submitted the Second Account Current to Petitioner; Trustees further admit that Petitioner filed written objections to the Second account current on 7/26/2012; however, Trustees deny that any deficiencies exist, legal or otherwise, in the Second Account Current;
- Trustees admit that they submitted the Third Account Current to Petitioner on or about 11/19/2012; Trustees further admit that they submitted the Fourth Account Current to Petitioner on or about 4/19/2013; however, Trustees deny that any deficiencies exist, legal or otherwise, in the Third Account Current and Fourth Account Current;
- The Trustees have filed a full account of their acts and proceedings during the period embraced thereby, and their Report and Account should be allowed and approved;
- Trustees expressly deny that any of the Second, Third and Fourth Accounts Current are deficient or otherwise fail to comply with the Trust or the requirements set forth in the Probate Code.

**Trustees pray for an Order of this Court finding that:**

1. The objections of Petitioner be dismissed;
2. All acts and transactions of the Trustees as reflected in the Account and Report be ratified and confirmed;
3. The Trustees be authorized and directed to continue the administration of the Sub-Trusts until such time as the remaining tasks discussed herein are accomplished, the remaining legal actions discussed herein are resolved, and a plan of final distribution can be presented to the beneficiaries of the trust for their consent;
4. Petitioner take nothing by way of her Petition; and
5. Attorney's fees and costs of suit are awarded to Respondents.

**~Please see additional page~**

**Objections to Third Account Current of the Family Trust filed by CARMELA DESANTIS filed on 11/5/2015 states:**

- The Third Account has not yet been filed with the Court in connection with this matter; accordingly, a true and correct copy of the Third Account Current of the Family Trust is attached at Exhibit A;
- The objections concern the Third Account related to the Family Sub-trust, one of the 3 sub-trusts of the Verni Family Trust: the Marital Sub-trust, Family Sub-trust, and Survivor's Sub-trust;
- As of the date of the date of the death of the surviving Trustor (Saverio Verni), the Marital Sub-trust and Family Sub-trust were merged into a single Family Sub-trust (the "Family Sub-trust");
- Respondent Antonietta Rosa Verni was at relevant times the Trustee of the Family Sub-trust; letter dated 10/21/2015 informed counsel that Rosa Verni has since resigned as Trustee of that Trust;
- Nick Verni is Trustee of the Survivor's Sub-trust;
- Objections to Third Account: The Third Account is incomplete in that it covers only the period of 1/1/2011 through 12/31/2011; the
- *[Detailed objections contained in Paragraphs 3 through 15, with Paragraph 16 stating that until Petitioner receives all information, she reserves the right to make further objections to the Third Account.]*
- **Objections to Third Account Current of the Survivor's Trust filed by CARMELA DESANTIS filed on 11/5/2015 states** in substantial form the same general allegations as the *Objections to the Third Account of the Family Trust*; *[Detailed objections contained in Paragraphs 3 through 15, with Paragraph 16 stating that until Petitioner receives all information, she reserves the right to make further objections to the Third Account.]*

**Petition for Settlement and Final Distribution on Waiver of Accounting, Report of Executor, and Petition for Allowance of Compensation to Executor and Attorneys for Ordinary Services**

<b>DOD: 1/1/14</b>		<p><b>CRAIG MACGLASHAN</b>, Son and Executor with Limited IAEA without bond, is Petitioner.</p> <p>Accounting is waived.</p> <p>I&amp;A: \$963,766.62 POH: <u>Not stated</u></p> <p>Executor (Statutory): \$22,275.33</p> <p>Attorney (Statutory): \$22,275.33</p> <p>Costs: \$25.50 (certified letters)</p> <p>Closing: \$4,900.00</p> <p>Petitioner requests distribution pursuant to Decedent's will as follows:</p> <p>Karen D. Bunting: Sapphire and diamond tennis bracelet and sapphire and diamond ring (See #3)</p> <p>Michele Lynn Lambert: Gold chain and diamond solitaire necklace and matching drop earrings (six diamonds) (See #3)</p> <p>Lisa Defoor: Emerald and diamond ring and emerald and diamond bracelet (See #3)</p> <p>Roberta Darrow MacGlashan: Engagement ring and diamond solitaire with ten small diamonds (See #3)</p> <p>Craig MacGlashan as successor trustee of testamentary trust: Residue of estate (See #4)</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p style="text-align: center;"><u><b>SEE PAGE 2</b></u></p>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input checked="" type="checkbox"/>	<b>Inventory</b>			
<input checked="" type="checkbox"/>	<b>PTC</b>			
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>			w
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input checked="" type="checkbox"/>	<b>Letters</b>			
<input type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input checked="" type="checkbox"/>	<b>9202</b>			
<input type="checkbox"/>	<b>Order</b>			x
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input checked="" type="checkbox"/>	<b>FTB Notice</b>			
			<b>Reviewed by:</b> skc	
			<b>Reviewed on:</b> 3/22/16	
			<b>Updates:</b>	
			<b>Recommendation:</b>	
			<b>File 7- McGlashan</b>	

**Page 2 - NEEDS/PROBLEMS/COMMENTS:**

1. Order entered 5/25/15 in the conservatorship 10CEPR00285 provided for distribution of all remaining assets in the conservatorship estate to the decedent's estate.

Schedule E of the final account, Assets on Hand as of 1/1/14, included Morgan Stanley Smith Barney Active Assets Account xx801076 with various securities. One of the securities assets listed within that account was 2,978,046 shares of Allianz OCC Growth A Fund, which had an estimated Fair Market Value on 1/1/14 of \$118,913.38. See last asset listed under Item No. 6 at Page 3 of Schedule E of the Amended Petition filed 2/23/15.

The Corrected Final I&A filed 2/18/16 in this estate matter appears to list the Morgan Stanley Active Assets Account, but reflects a different account number xx515076, and although it lists all of the other securities shown in the Conservatorship accounting, it excludes the above-referenced Allianz asset.

However, a separate asset is shown, categorized as a Mutual Fund, that indicates 0.331 shares "Allianzgi Focused Growth A", but with the same CUSIP number as the above Allianz asset, and valued at \$13.22. See Item No. 2 on Attachment No. 2 of Corrected Final I&A filed 2/18/16.

Therefore, need clarification as to this discrepancy:

- Is the asset listed in the estate I&A the same Morgan Stanley account as was identified as property on hand at the decedent's date of death in the Conservatorship Estate?
- Is the asset listed in this estate I&A as "Allianzgi..." the same asset as the "Allianz OCC Growth A Fund" that was part of the Morgan Stanley account in the Conservatorship Estate?
- What happened to the balance of the shares and/or value?

2. Need statement of Assets On Hand pursuant to Cal. Rule of Court 7.550(b)(4).  
Note: At Paragraphs 13 and 29, Petitioner refers to the I&A value of \$963,766.62 as "assets of the estate on hand as of January 1, 2014, (date of decedent's death)," but does not appear to state the current POH anywhere.
3. The decedent's will contains specific devises of various jewelry items to various heirs; however, no jewelry was inventoried among the assets of this estate. The Court cannot authorize distribution of items that were not inventoried as assets of the estate. If these jewelry items are assets of the estate, need Supplemental I&A with appraisal by Probate Referee. If not, this distribution request should not be included in the petition or proposed order, and the Court may require amended petition and/or notice to the affected heirs that such distribution will not be ordered by the Court.
4. Petitioner requests to distribute the jewelry items as noted in #3 above, and then requests to distribute the remaining part of the estate to Craig MacGlashan as trustee of the testamentary trust created under the will. However, the decedent's will provides that the various personal property assets (including furs, art, furniture, antiques/silver, etc.) be distributed to Craign MacGlashan outright. The trust is then created for the balance, and should not include the personal property assets.
5. Need new order pursuant to Local Rules 7.1.1.F, 7.6.1. Order should indicate specific distributions, pursuant to above issues, should state cash in dollar amounts, and should establish and contain the terms of the testamentary trust. Order should be complete in itself, without having to reference the petition, will, or other file documents.

**Petition for Final Distribution on Waiver of Accounting and for Allowance of Fees**

<b>DOD: 8/18/14</b>	<b>COLLIN T. BRYANT</b> , Executor, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Accounting is waived.	
<b>Cont. from</b>	I & A - <b>\$133,934.57</b>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	POH - <b>\$ 68,382.07</b>	
<input checked="" type="checkbox"/> <b>Verified</b>	Executor - <b>waives</b>	
<input checked="" type="checkbox"/> <b>Inventory</b>	Attorney (statutory) - <b>\$5,018.04</b>	
<input checked="" type="checkbox"/> <b>PTC</b>	Costs - <b>\$435.00</b>	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	Distribution, pursuant to Decedent's Will, is to:	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	<b>Collin T. Bryant</b> - \$63,382.07,	
<input type="checkbox"/> <b>Aff.Mail</b>	3050 shares of common stock of	
<input type="checkbox"/> <b>Aff.Pub.</b>	Assured Financial Group, furniture and	
<input checked="" type="checkbox"/> <b>Sp.Ntc.</b>   W/	furnishings.	
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>   11/18/14		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> KT
		<b>Reviewed on:</b> 3/22/16
		<b>Updates:</b>
		<b>Recommendation:</b> SUBMITTED
		<b>File 8- Bryant</b>

<b>DOD: 04/03/2006</b>		<b>STEPHEN A. MANELSKI</b> , Executor, is petitioner.	<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <p><b>Minute order of 02/17/2016: Continued per the request of Counsel.</b></p> <p>1. Petition states the sole asset of the estate is the net proceeds from the sale of real property in the state of New York that was passed in an ancillary proceeding directly to the Marie D. Manelski Revocable Living Trust, it appears that no assets were ever marshalled in this state and therefore it appears that this is a no asset estate.</p>
		Accounting is waived	
<b>Cont. from 021716</b>		I&A - <b>\$84,000.00</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	POH - <b>\$0</b>	
<input checked="" type="checkbox"/>	<b>Verified</b>	Executor - <b>Waives</b>	
<input type="checkbox"/>	<b>Inventory</b>	Attorney - <b>\$3,360.00</b>	
<input type="checkbox"/>	<b>PTC</b>	(Statutory)	
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>	<b>Petitioner states:</b> the sole asset of the probate estate was a parcel of real property in New York State. The executor commenced an ancillary probate proceeding in that state, Nassau County Surrogates Court Case No. 2015-388301, and was appointed ancillary executor by that court. Pursuant to that authorization and to New York law, the Executor sold the real property, together with surrounding parcels which were owned by the Trust and by related family trusts. The estate has no assets, proceeds of the sale of the property having been distributed to the Trust in the New York ancillary probate. The estate holds no cash. All estate expenses have been paid to date by the Trust. Further, the Trust agrees to pay the attorney's fees and any remaining costs payable to the estate.	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	<b>Wherefore, Petitioner requests this Court order that:</b>	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	w/	
<input type="checkbox"/>	<b>Aff.Pub.</b>	1. The administration of this estate be brought to a close without a requirement of an accounting;	
<input type="checkbox"/>	<b>Sp.Ntc.</b>	2. All the acts and proceedings of Petitioner as Executor be confirmed as approved;	
<input type="checkbox"/>	<b>Pers.Serv.</b>	3. Petitioner be authorized and directed to pay Lang, Richert & Patch the sum of \$3,360.00 as statutory attorneys' fees for services rendered to the estate and to the Executor; and	
<input type="checkbox"/>	<b>Conf. Screen</b>	4. Such further order be made as this Court may deem proper.	
<input checked="" type="checkbox"/>	<b>Letters</b>	06/19/15	
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>	X	
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		

<b>Reviewed by:</b> LV
<b>Reviewed on:</b> 03/22/2016
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 9- Manelski</b>

Report of Sale and Petition for Order Confirming Sale of RP

		<b>PUBLIC GUARDIAN</b> is Conservator/petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>Sale price</b> - \$110,000.00	
		<b>Overbid</b> - 116,000.00	
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>	<b>Appraisal</b> - \$120,000.00	
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>	<b>Property</b> - 3023 E. Cornell Ave. Fresno	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> W/	<b>Publication</b> - Business Journal	
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>	<b>Buyers</b> - Patrick Martin, as a single man.	
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>	<b>Broker</b> - \$5,500.00 (5% - payable ½ to Jeff Starbuck of Guarantee Realty (seller's agent) and ½ to Linda Liles of Guarantee Realty (buyer's agent))	
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input checked="" type="checkbox"/>	<b>Aff. Posting</b>		<b>Reviewed by:</b> KT
<input type="checkbox"/>	<b>Status Rpt</b>		<b>Reviewed on:</b> 3/22/16
<input type="checkbox"/>	<b>UCCJEA</b>		<b>Updates:</b>
<input type="checkbox"/>	<b>Citation</b>		<b>Recommendation:</b>
<input type="checkbox"/>	<b>FTB Notice</b>		<b>File</b> 10- Owen



**Petition for Probate of Will and for Letters Testamentary;  
Authorization to Administer under the IAEA**

<b>DOD: 6/21/15</b>		<p><b>JOSEPH G. SANDOVAL</b>, Beneficiary, is Petitioner and requests appointment as Executor with Full IAEA without bond.</p> <p>Petitioner is the sole beneficiary pursuant to the will and waives bond.</p> <p>Full IAEA – need publication</p> <p>Will dated 6/7/95</p> <p>Residence: Fresno Publication – need publication</p> <p><b>Estimated value of estate:</b> Personal property: \$10,00 Real property: \$45,00 0.00 (\$230,000.00, encumbered for \$185,000.00) Total: \$55,00 0.00</p> <p>Probate Referee: Steven Diebert</p> <p>Petitioner states there are no relatives to give notice to. The decedent was survived by no known next of kin.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> Petitioner’s Ex Parte Petition for Letters of Special Administration was set for hearing on 1/25/16, and was denied on that date due to non-appearance. See Minute Order for details.</p> <p><b>Minute Order 2/17/16:</b> No appearance, petition denied. <u>Later and off the record:</u> The Court was informed that the petitioner was on CourtCall and could not be heard. The Court overturns the denied order and continues the matter to 3/28/16. A copy of the Minute order was mailed to petitioner on 2/17/16.</p> <ol style="list-style-type: none"> <li>Petitioner requests appointment as Executor; however, the holographic will does not name an executor. It appears appointment as Administrator with Will Annexed, if the will is admitted to probate, would be more appropriate.</li> <li>Need Proof of Subscribing Witness (DE-131) pursuant to Probate Code §8220.</li> <li>Need publication pursuant to Probate Code §8120.</li> <li>The will is holographic and/or handwritten. Need typed copy of the will pursuant to Probate Code §8002(b)(1).</li> <li>Although Petitioner states he is the sole heir and waives bond, there have already been two creditor’s claims filed in this estate. The Court may require bond of \$55,000.00.</li> <li>This estate was opened with a fee waiver. If assets are distributed pursuant to this estate, all filing fees will be due.</li> </ol> <p><b>SEE ADDITIONAL PAGES</b></p>
<b>Cont. from 021716</b>			
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/> <b>Verified</b>	<input type="checkbox"/>		
<input type="checkbox"/> <b>Inventory</b>	<input type="checkbox"/>		
<input type="checkbox"/> <b>PTC</b>	<input type="checkbox"/>		
<input type="checkbox"/> <b>Not.Cred.</b>	<input type="checkbox"/>		
<input type="checkbox"/> <b>Notice of Hrg</b>	<input checked="" type="checkbox"/>		
<input type="checkbox"/> <b>Aff.Mail</b>	<input checked="" type="checkbox"/>		
<input type="checkbox"/> <b>Aff.Pub.</b>	<input checked="" type="checkbox"/>		
<input type="checkbox"/> <b>Sp.Ntc.</b>	<input type="checkbox"/>		
<input type="checkbox"/> <b>Pers.Serv.</b>	<input type="checkbox"/>		
<input type="checkbox"/> <b>Conf. Screen</b>	<input type="checkbox"/>		
<input checked="" type="checkbox"/> <b>Letters</b>	<input type="checkbox"/>		
<input checked="" type="checkbox"/> <b>Duties/Supp</b>	<input type="checkbox"/>		
<input type="checkbox"/> <b>Objections</b>	<input type="checkbox"/>		
<input type="checkbox"/> <b>Video Receipt</b>	<input type="checkbox"/>		
<input type="checkbox"/> <b>CI Report</b>	<input type="checkbox"/>		
<input type="checkbox"/> <b>9202</b>	<input type="checkbox"/>		
<input checked="" type="checkbox"/> <b>Order</b>	<input type="checkbox"/>		
<input type="checkbox"/> <b>Aff. Posting</b>	<input type="checkbox"/>		
<input type="checkbox"/> <b>Status Rpt</b>	<input type="checkbox"/>		
<input type="checkbox"/> <b>UCCJEA</b>	<input type="checkbox"/>		
<input type="checkbox"/> <b>Citation</b>	<input type="checkbox"/>		
<input type="checkbox"/> <b>FTB Notice</b>	<input type="checkbox"/>		
<b>Reviewed by:</b> skc			
<b>Reviewed on:</b> 3/18/16			
<b>Updates:</b>			
<b>Recommendation:</b>			
<b>File 17- Watson</b>			

Page 2

Note: If granted, the Court will set status hearings as follows:

- Monday, August 29, 2016 for the filing of the Inventory and Appraisal
- Monday, May 22, 2017 for the filing of the first account or petition for final distribution.

If the proper items are on file pursuant to Local Rule 7.5, the status hearings may come off calendar.

Attorney Wilson, Roger D. (for Petitioner Joyce Weber)

Attorney Lind, Ruth (Court Appointed for Proposed Conservatee Sandra L. Detwiler)

Petition for Appointment of Probate Conservator of the Person and Estate

		See petition for details.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Court Investigator advised rights on 2/4/16.</p> <p>Voting rights affected – need minute order.</p> <p><b>Note:</b> Bond of \$106,980.00 was filed 2/18/16; however, temp letters have not issued.</p> <ol style="list-style-type: none"> <li>1. Need clarification regarding the request for §2590 powers at #1d of the petition, since Petitioner does not indicate that real property would be held in the conservatorship estate.</li> <li>2. Need clarification regarding the request for additional powers at #1f under §§ 2351-2358. No attachment is provided.</li> </ol> <p><b>Note:</b> If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> <li>• Monday, July 25, 2016 for filing the Inventory and Appraisal</li> <li>• Monday May 22, 2017 for filing the first account</li> </ul> <p>If the proper items are on file per Local Rule 7.5, the status hearing may come off calendar.</p> <p>Reviewed by: skc</p> <p>Reviewed on: 3/18/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 18- Detwiler</p>	
Cont. from 022216				
	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			
	9202			
✓	Order			W
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			

**Petition for Letters of Administration; Authorization to Administer Under IAEA**

<b>DOD: 12/24/2015</b>		<b>BRENT L. PIUS</b> , father, is petitioner and requests appointment as administrator without bond	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Waivers of bond – <b>need</b>	<ol style="list-style-type: none"> <li>Waivers of bond are not filed on the mandatory use Judicial Council form. Need Waiver of Bond by Heir or Beneficiary (DE-142) for:                     <ol style="list-style-type: none"> <li>Diana K. Pius (mother)</li> </ol> </li> <li>Decedent was a resident of Prather. Per Local Rule 7.9, if decedent lived outside the city limits of Prather, publication shall be in the <i>Fresno Bee</i> or <i>Fresno Business Journal</i>. Publication was in the <i>Fresno Business Journal</i>. However, per a declaration filed 3/14/16, Petitioner is unclear if decedent lived outside the Prather city limits, so “<i>in an abundance of caution</i>,” is also publishing the <i>Notice of Petition to Administer Estate</i> in the <i>Mountain Press</i> at least two times before the hearing, with the third publication occurring the Wednesday after the hearing. Court may require proof of publication in the <i>Mountain Press</i>.</li> </ol> <p><b>Note:</b> If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> <li><b>Tuesday, August 30, 2016</b> for filing Inventory and Appraisal</li> <li><b>Tuesday, May 30, 2017</b> for filing the first account or petition for final distribution</li> </ul>
<b>Cont. from</b>		Full IAEA – o.k.	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>	Decedent died intestate	
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>	Residence: Prather	
<input type="checkbox"/>	<b>Not.Cred.</b>	Publication: Business Journal* <b>(*See note 2)</b>	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	<b>Estimated value of Estate:</b>	
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>	Personal property \$ 0.00	
<input type="checkbox"/>	<b>Sp.Ntc.</b>	Annual gross income: \$ 0.00	
<input type="checkbox"/>	<b>Pers.Serv.</b>	Real property: \$ 200,000.00	
<input type="checkbox"/>	<b>Conf. Screen</b>	<b>Total: \$ 200,000.00</b>	
<input checked="" type="checkbox"/>	<b>Letters</b>	<b>Probate Referee: Steven Diebert</b>	
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> SEF
			<b>Reviewed on:</b> 3/18/2016
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 21- Pius</b>

Petition for Letters of Administration; Authorization to Administer Under Limited IAEA

<b>DOD: 2/3/2016</b>	<b>CAROL DONALDSON</b> , sister, is petitioner and requests appointment as Administrator with Limited IAEA without bond	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need <i>Notice of Petition to Administer Estate</i>.</li> <li>2. Need proof of service 15 days prior to the hearing of the <i>Notice of Petition to Administer Estate</i> pursuant to Probate Code 8110 on the following:                     <ol style="list-style-type: none"> <li>a. Kristopher Phillips (son)</li> <li>b. Joshua Phillips (son)</li> <li>c. Nicholas Phillips (son)</li> <li>d. Jessilyn Phillips (daughter)</li> </ol> </li> <li>3. Need proof of publication pursuant to Probate Code 8120 et seq.</li> <li>4. Need <i>Duties and Liabilities of Personal Representative</i> (DE-147).</li> <li>5. Need <i>Confidential Supplement to Duties and Liabilities of Personal Representative</i> (DE-147S).</li> <li>6. Need <i>Orders</i>.</li> <li>7. Need <i>Letters</i>.</li> </ol> <p><b>Note:</b> If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> <li>• <b>Tuesday, August 30, 2016</b> for filing Inventory and Appraisal</li> <li>• <b>Tuesday, May 30, 2017</b> for filing the first account or petition for final distribution</li> </ul>
<b>Cont. from</b>	All heirs waive bond	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Limited IAEA – <b>need</b>	
<input checked="" type="checkbox"/> <b>Verified</b>	Decedent died intestate	
<input type="checkbox"/> <b>Inventory</b>	Residence: Coalinga	
<input type="checkbox"/> <b>PTC</b>	Publication: Business Journal	
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>		
<input type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		

