



## 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 Melvin K. Rube (for Petitioner Dennis H. Johns)

**First and Final Account and Report of Executor and Petition for its Settlement, for Allowance of Statutory Attorney's Fees and Statutory Executor's Compensation, and for Final Distribution**

<b>DOD: 1/8/2014</b>	<b>DENNIS H. JOHNS</b> , son and Executor, is Petitioner.		<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>Account period: 1/8/2014 – 11/30/2015</b>		<b>Continued from 2/23/2016.</b> Minute Order states counsel requests 30 days to cure the defects.
	Accounting	- \$309,629.12	
	Beginning POH	- \$302,376.62	<b>The following defects from the last hearing remain:</b>
	Ending POH	- \$297,917.95 (\$7,855.71 is cash)	
<b>Cont. from 022316</b>			1. <i>Schedule D, Property on Hand</i> , is unclear as to whether the cash on hand is <b>\$7,855.71</b> , or whether the investment account is also a cash account such that <b>\$30,062.24</b> is also cash on hand. Further, the cash sum distributable to the 4 devisees in Decedent's Will ( <b>\$4,524.45</b> to each) appears to be incorrect.
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			2. Need revised proposed order pursuant to Local Rule 7.6.1, containing a statement as to the balance of the estate on hand, specifically noting the amount of cash included in the balance and the cash amounts to be distributed.  <b>~Please see additional page~</b>
<input checked="" type="checkbox"/> Inventory		Executor (statutory) - \$9,192.58	
<input checked="" type="checkbox"/> PTC			<b>Reviewed by:</b> LEG
<input checked="" type="checkbox"/> Not.Cred.		Attorney (statutory) - \$9,192.58	
<input checked="" type="checkbox"/> Notice of Hrg			<b>Reviewed on:</b> 3/23/16
<input checked="" type="checkbox"/> Aff.Mail	W/	Executor Costs - \$2,936.34 (paid) (filing fee, probate referee, publication, certified copies, Courtcall, postage, rental car, recording fees, misc. expenses;)	<b>Updates:</b>
<input type="checkbox"/> Aff.Pub.			<b>Recommendation:</b>
<input type="checkbox"/> Sp.Ntc.			<b>File 5- Johns</b>
<input type="checkbox"/> Pers.Serv.		Attorney Costs (filing fee) - \$435.00	
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters	062314	Closing - \$1,000.00	
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections		<b>Distribution pursuant to Decedent's Will is to:</b>	
<input type="checkbox"/> Video Receipt		<ul style="list-style-type: none"> <li>• <b>DENNIS H. JOHNS</b> – 25% interest in three parcels of real property and [<b>\$4,524.45 cash</b>];</li> <li>• <b>CHARLOTTE G. JONES</b> – 25% interest in three parcels of real property and [<b>\$4,524.45 cash</b>];</li> <li>• <b>SHARON A. RICHARDSON</b> – 25% interest in three parcels of in real property and [<b>\$4,524.45 cash</b>];</li> <li>• <b>GARY W. JOHNS</b> – 25% interest in three parcels of real property and [<b>\$4,524.45 cash</b>].</li> </ul>	
<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			

NEEDS/PROBLEMS/COMMENTS, continued:

The following defects remain noted for the Court's reference in considering Petitioner's additional information provided in the *Declaration of Dennis Johns* filed 3/17/2016 (noted below):

- *Schedule C, Disbursements* includes the following expenditures, which the Court may require Petitioner to explain and justify as appropriately paid from the estate:
  - Payment on 7/5/2015 of **\$800.00** to Linda Bolton for "appraisal of property," while *Schedule C1, Costs Advanced* includes an entry on 8/28/2014 for Probate Referee Rick Smith's appraisal fee, paid by and reimbursed to Petitioner in the sum of **\$300.00**; no explanation is given for the separate appraisal fee to the non-probate appraiser disbursed from the estate. It is noted that two separate Inventory and Appraisals filed 8/13/2014 have as an attachment a document entitled "Bolton Appraisal," apparently associated with this additional **\$800.00** charge to the estate.
  - Several payments to Greenwood & Assoc. totaling **\$3,159.30** for "property line adjustment" and "property line change" which are unexplained in the Petition.
  - *Petition* states that Petitioner reimbursed himself **\$2,936.34** from the estate for costs he advanced. Reimbursement of funds advanced by the personal representative is authorized by Probate Code § 9252(a) and (b) to be done after Court approval of the reimbursement. Court may require Petitioner as the Executor to pay back to the estate any sums which the Court finds in its discretion should not have been reimbursed to the Executor without prior Court authorization. Further, the following are non-reimbursable costs pursuant to Local Rule 7.17(B): **\$344.00** for CourtCall fees; **\$17.05** for postage fees (*other postage for mailing to 10+ beneficiaries OK*); **\$615.75** for rental car – no explanation for rental is provided.

**Declaration of Dennis Johns Re: Estate Expenditures and Reimbursement of Costs Advanced to the Estate** filed 3/17/2016 states, in brief sum:

- The Court continued the hearing on the account to 3/29/2016 and requested further information regarding [the payments, listed above];
- Since he did not know much about the probate of his mother's estate and was going to represent himself, he retained a private appraiser (Linda Bolton) to appraise the real property and paid her **\$800.00**; he did not know until after he was appointed by the Court as Executor that the appraisal by the court appointed Probate Referee was required and that he should not have retained a private appraiser;
- The payments to Greenwood & Assoc. totaling **\$3,159.30** was for a required "property line adjustment" to change the property line back to the original property line that had been changed following a fire and rebuilding with an additional garage; in order to sell the properties Greenwood was retained to change the property line back to its original state;
- As to the payment of **\$2,936.34** he reimbursed to himself from the estate for costs advanced, he did not realize that he had to wait for court approval before he could reimburse himself; the CourtCall fees were made so he could appear in Court by telephone instead of traveling from his home in Alaska; he was not aware of the rule regarding postage; the car rental fee was so he would have transportation to take care of estate business while in the Fresno area, and it was cheaper for him to fly to California and rent a car.

**Note:** Approval by Beneficiary of First and Final Account and Report of Executor and Petition for Final Distribution was filed 3/11/2016 by the estate beneficiaries other than Petitioner: **CHARLOTTE G. JONES, SHARON A. RICHARDSON, and GARY W. JOHNS.**

**First and Final Account and Report of Conservator; Petition for Allowance of Compensation to Conservator and Her Attorney**

<b>DOD: 4/15/15</b>	<b>PUBLIC GUARDIAN</b> , Conservator, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Account period: 9/19/14 – 4/15/15	
	Accounting - <b>\$388,972.64</b>	
<b>Cont. from</b>	Beginning POH - <b>\$349,286.31</b>	
<b>Aff.Sub.Wit.</b>	Ending POH - <b>\$344,616.03</b>	
<input checked="" type="checkbox"/> <b>Verified</b>	Subsequent Account period:	
<b>Inventory</b>	4/16/15 – 12/8/15	
<b>PTC</b>	Accounting - <b>\$351,451.49</b>	
<b>Not.Cred.</b>	Beginning POH - <b>\$344,616.03</b>	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Ending POH - <b>\$0</b>	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> W/	Conservator - <b>\$12,819.92</b> (96.57 Deputy hours @ \$96/hr and 46.70 Staff hours @ \$76/hr)	
<b>Aff.Pub.</b>	Attorney - <b>\$2,500.00</b> (per Local Rule)	
<b>Sp.Ntc.</b>	Bond Fee - <b>\$25.00</b> (o.k.)	
<b>Pers.Serv.</b>	Court Fees - <b>\$617.00</b> (filing fee, certified copies)	
<b>Conf. Screen</b>	All assets of the conservatorship were delivered to Brad Jacobson as Administrator of the deceased conservatee's estate.	
<b>Letters</b>	Petitioner request that due to the insufficiency of the estate to pay the fees and commissions that a lien be imposed upon the estate for any unpaid balances of the authorized fees and commissions.	
<b>Duties/Supp</b>	<b>Petitioner prays for an Order:</b>	
<b>Objections</b>	1. Approving, allowing and settling the First and Final Account;	
<b>Video Receipt</b>	2. Authorizing the conservator and attorney fees and commissions;	
<b>CI Report</b>	3. Payment of the bond fee;	
<b>9202</b>	4. Authorize petitioner to impose a lien on the estate for any unpaid balances of authorized fees and commissions to be paid by administrator, Brad Jacobson.	
<input checked="" type="checkbox"/> <b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

**Reviewed by:** KT  
**Reviewed on:** 3/23/16  
**Updates:**  
**Recommendation:**  
**File 7- Craig**

Atty Randall W. Rosá, of Lodi (for Petitioner Michael B. Bebb)

**Petition for Waiver of Final Account for Final Distribution, for Allowance of Attorney's Fees and Costs**

<b>DOD: 4/29/2014</b>	<b>MICHAEL B. BEBB</b> , son and Administrator, is Petitioner.		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
	Accounting is waived.			
<b>Cont. from</b>	I & A	— \$117,110.00		
<b>Aff.Sub.Wit.</b>	POH	— \$114,499.25		
✓ <b>Verified</b>		(all cash)		
✓ <b>Inventory</b>	Administrator	— <b>waives</b>		
✓ <b>PTC</b>	Attorney	— \$5,113.30		
✓ <b>Not.Cred.</b>	(statutory)			
✓ <b>Notice of Hrg</b>	Costs	— \$1,260.00		
✓ <b>Aff.Mail</b>	W/O	(filing fees, publication)		
<b>Aff.Pub.</b>	<b>Distribution pursuant to intestate succession is to:</b>			
<b>Sp.Ntc.</b>	<ul style="list-style-type: none"> <li>• MICHAEL B. BEBB – \$36,041.98 cash;</li> <li>• KENNETH W. BEBB – \$36,041.98 cash;</li> <li>• KELLY M. BEBB – \$36,041.98 cash.</li> </ul>			
<b>Pers.Serv.</b>				
<b>Conf. Screen</b>				
<b>Letters</b>	031015			
<b>Duties/Supp</b>				
<b>Objections</b>				
<b>Video Receipt</b>				
<b>CI Report</b>				
✓ <b>9202</b>				
✓ <b>Order</b>				
<b>Aff. Posting</b>				
<b>Status Rpt</b>				
<b>UCCJEA</b>				
<b>Citation</b>				
✓ <b>FTB Notice</b>				
				<b>Reviewed by:</b> LEG
				<b>Reviewed on:</b> 3/23/16
			<b>Updates:</b>	
			<b>Recommendation:</b> SUBMITTED	
			<b>File 9- Bebb</b>	

Petitioner: Elvira Zavala (pro per)

**Petition for Appointment of Guardian of the Person**

		<b><u>TEMPORARY EXPIRES 3/29/16</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>ELVIRA ZAVALA</b> , maternal grandmother, is petitioner.	<ol style="list-style-type: none"> <li>1. Need Notice of Hearing.</li> <li>2. Need proof of personal service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on:                             <ol style="list-style-type: none"> <li>a. Ernest Cota (father)</li> <li>b. Jessica Samora (mother)</li> </ol> </li> <li>3. Need proof of service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on:                             <ol style="list-style-type: none"> <li>c. Jesse Cota (paternal grandfather)</li> <li>d. Nancy Cota (paternal grandmother)</li> <li>e. Mark Samora (maternal grandfather)</li> </ol> </li> <li>4. #1c of the Child Information Attachment was not answered regarding whether or not the child has Native American ancestry.</li> </ol>
		Please see petition for details.	
<b>Cont. from</b>		<b>Court Investigator Report filed on 3/18/16</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>	X	
<input type="checkbox"/>	<b>Aff.Mail</b>	X	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>	X	
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input checked="" type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input checked="" type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by: KT</b>
			<b>Reviewed on: 3/23/15</b>
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 11- Cota</b>

Petitioner Anastasia Clark (Pro Per – non-relative)

Petition for Appointment of Guardian of the Person

		<b>TEMPORARY EXPIRES 02/16/16; extended to 3/29/2016</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>ANASTASIA CLARK</b> , non-relative, is Petitioner.	<b>Note:</b> Declaration for Change of Name filed 3/22/2016 states Petitioner requests the Court make a correction to the minor's name, which should be spelled Treasure Burks, not Treasure Burke.
<b>Cont. from 021616</b>		<b>Please see Petition for details.</b>	<b>Continued from 2/16/2016.</b> Minute Order states Ms. Clark provides the Court with a letter from Carlos Burks, father. No further notice to father required. Maternal grandfather is deceased. Examiner notes provided.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory	<b>DSS Social Worker Irma Ramirez</b> filed report on 02/11/16.	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input 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		
			<b>Reviewed by:</b> JF / LEG
			<b>Reviewed on:</b> 3/23/16
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 16- Burke</b>

Attorney Amy R. Lovegren-Tipton (for Petitioners Jill Williams and Ken Williams)

Petition for Appointment of Probate Conservator of the Person and Estate

		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>CONTINUED TO 4/13/2016</b> Per Attorney request</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	
<input type="checkbox"/>	Aff.Mail	
<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	
<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: LEG
		Reviewed on: 3/23/16
		Updates:
		Recommendation:
		File 21- Williams