



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.

Probate Status Hearing RE: Filing of the 19th Account

		<p>MICHAEL PAPPOCODA and JOYCE THOMAS are Co-Trustees.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need 19th account or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
		<p>The 18th account with an account period ending on 12/231/14 was approved on 7/1/15.</p>	
Cont. from		<p>Minute order dated 7/1/15 set this status hearing for the filing of the 19th account.</p>	
<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		
			<p>Reviewed by: KT</p>
			<p>Reviewed on: 3/23/16</p>
			<p>Updates:</p>
			<p>Recommendation:</p>
			<p>File 1- Goering</p>

Petitioner Jennifer Young (Court Investigator)

Conservator Gayle Libby

Probate Status Hearing Re: Receipt of Transfer

		<p>Court Investigator Jennifer Young filed a <i>Petition for Transfer</i> on 11/2/2015.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
		<p>Order on Petition for Transfer filed 1/5/2016 finds all proceedings in the Conservatorship of the Person of Monica Libby are hereby transferred to the Superior Court of California, County of Tulare.</p>	
Cont. from		<p><i>Minute Order</i> dated 1/5/2016 from the hearing on the petition set this status hearing on 3/30/2016 for filing of receipt of transfer.</p>	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	Transfer	<input checked="" type="checkbox"/>	
<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 2- Libby

3A Lorena C. De La Mora (Estate) Case No. 12CEPR00781

Attorney: Judith A. Wright (for Petitioner Delia Gonzalez)

Third and Final Account and Report of Administrator and petition for Its Settlement; Petition for Final Distribution; and for Allowance of Compensation for Ordinary Fees.

DOD: 8/25/12		DELIA GONZALEZ , Administrator, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Pursuant to Local Rule 7.12.6 the Court will set a Status Hearing as follows:</p> <ul style="list-style-type: none"> Wednesday, September 28, 2016 at 9:00 a.m. in Dept. 303 for an Informal Accounting of the \$10,000.00 Closing Reserve. <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. Filing of the informal accounting of closing reserve will not generate a new hearing date.</p>
		Account period: 11/22/14 – 12/18/15	
		Accounting - \$1,359,726.92	
		Beginning POH - \$1,265,900.45	
Cont. from		Ending POH - \$ 717,714.12	
<input type="checkbox"/>	Aff.Sub.Wit.	Administrator - \$34,402.50 (statutory, \$18,000 has already been paid per court order leaving a balance of \$16,402.49)	
<input checked="" type="checkbox"/>	Verified	Attorney - \$34,402.50 (statutory, \$18,000 has already been paid per court order leaving a balance of \$16,402.49)	
<input checked="" type="checkbox"/>	Inventory	Closing - \$10,000.00	
<input checked="" type="checkbox"/>	PTC	Distribution, pursuant to intestate succession, is to:	
<input checked="" type="checkbox"/>	Not.Cred.	Rafael De La Mora - \$221,636.37 and 1/3 of the furniture, furnishings and personal effects.	
<input checked="" type="checkbox"/>	Notice of Hrg	Public Guardian for the benefit of Francisco De La Mora - \$203,812.06; 50% interest in notes receivable as follows: ID ending 3210 with a balance of \$2,940.00; ID ending 3120 with a balance of \$7,442.32; ID ending 8933 with a balance of \$7,442.00 and 1/3 of the furniture, furnishings and personal effects.	
<input checked="" type="checkbox"/>	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	9202	Oscar and Trisha Barba, Guardians of the Estate of Fernando De La Mora - \$221,636.37 and 1/3 of the furniture, furnishings and personal effects.	
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
		Reviewed by: KT	
		Reviewed on: 3/25/16	
		Updates:	
		Recommendation:	
		File 3A- De La Mora	

Petition for Withdrawal of Funds from Blocked Account

DOD: 8/25/12	DELIA GONZALEZ , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	Petitioner states there is currently the balance of \$48,718.59 in a blocked account at JP Morgan Chase Bank.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory	Petitioner requests the authority to withdraw said funds, for the purpose of final distribution, and distribute the as follows:	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	<ul style="list-style-type: none"> \$27,532.20 payable to the Fresno Public Guardian for the benefit of Francisco De La Mora. 	
<input checked="" type="checkbox"/> Aff.Mail	W/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.	<ul style="list-style-type: none"> \$31,186.39 plus accrued interest to Delia Gonzalez, Administrator of the Estate of Lorena De La Mora. 	
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 3/25/16
		Updates:
		Recommendation:
		File 3B- De La Mora

Petition for Withdrawal of Funds from Blocked Account

DOD: 8/25/12	DELIA GONZALEZ , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	Petitioner states there is currently the balance of \$225,128.85 in a blocked account at Premier Valley Bank.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory	Petitioner requests the authority to withdraw said funds, for the purpose of final distribution, and distribute the as follows:	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	<ul style="list-style-type: none"> \$221,636.37 payable to Rafael De La Mora. 	
<input checked="" type="checkbox"/> Aff.Mail	W/	
<input type="checkbox"/> Aff.Pub.	<ul style="list-style-type: none"> \$3,492.48 plus accrued interest to Delia Gonzalez, Administrator of the Estate of Lorena De La Mora. 	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 3/25/16
		Updates:
		Recommendation:
		File 3C- De La Mora

Petition for Withdrawal of Funds from Blocked Account

DOD: 8/25/12	DELIA GONZALEZ , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	Petitioner states there is currently the balance of \$107,287.85 in a blocked account at Central Valley Community Bank.	
<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	Petitioner requests the authority to withdraw said funds, for the purpose of final distribution, and distribute the as follows:	
<input checked="" type="checkbox"/> Aff.Mail	W/ <ul style="list-style-type: none"> • \$107,287.85 payable to the Oscar and Tricia Barba, Guardians of the Estate of Fernando De La Mora. • Accrued interest to Delia Gonzalez, Administrator of the Estate of Lorena De La Mora. 	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 3/25/16
		Updates:
		Recommendation:
		File 3D- De La Mora

Petition for Withdrawal of Funds from Blocked Account

DOD: 8/25/12	DELIA GONZALEZ , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	Petitioner states there is currently the balance of \$176,279.86 in a blocked account at Wells Fargo Bank.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory	Petitioner requests the authority to withdraw said funds, for the purpose of final distribution, and distribute the as follows:	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	<ul style="list-style-type: none"> \$176,279.86 payable to the Fresno Public Guardian for the benefit of Francisco De La Mora. 	
<input checked="" type="checkbox"/> Aff.Mail	W/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.	<ul style="list-style-type: none"> Accrued interest to Delia Gonzalez, Administrator of the Estate of Lorena De La Mora. 	
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 3/25/16
		Updates:
		Recommendation:
		File 3A- De La Mora

Third and Final Account and Report of Administrator and petition for Its Settlement; Petition for Final Distribution; and for Allowance of Compensation for Ordinary Fees.

DOD: 8/25/12	DELIA GONZALEZ , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Note: Pursuant to Local Rule 7.12.6 the Court will set a Status Hearing as follows: <ul style="list-style-type: none"> Wednesday, September 28, 2016 at 9:00 a.m. in Dept. 303 for an Informal Accounting of the \$10,000.00 Closing Reserve. 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. Filing of the informal accounting of closing reserve will not generate a new hearing date.
	Account period: 11/22/14 – 12/18/15	
	Accounting - \$1,578,522.81	
	Beginning POH - \$1,481,080.22	
	Ending POH - \$ 632,625.88	
Cont. from	Administrator - \$36,548.32 (statutory, \$18,000 has already been paid per court order leaving a balance of \$18,584.32)	
<input type="checkbox"/> Aff.Sub.Wit.	Attorney - \$36,548.32 (statutory, \$18,000 has already been paid per court order leaving a balance of \$18,584.32)	
<input checked="" type="checkbox"/> Verified	Closing - \$10,000.00	
<input checked="" type="checkbox"/> Inventory	Distribution, pursuant to intestate succession, is to:	
<input checked="" type="checkbox"/> PTC	Rafael De La Mora - \$113,814.90 and 1/3 of the furniture, furnishings and personal effects.	
<input checked="" type="checkbox"/> Not.Cred.	Public Guardian for the benefit of Francisco De La Mora - \$95,990.60; 50% interest in notes receivable as follows: ID ending 3210 with a balance of \$2,940.00; ID ending 3120 with a balance of \$7,442.32; ID ending 8933 with a balance of \$7,442.00 and 1/3 of the furniture, furnishings and personal effects.	
<input checked="" type="checkbox"/> Notice of Hrg	Oscar and Trisha Barba, Guardians of the Estate of Fernando De La Mora - \$113,814.90 and 1/3 of the furniture, furnishings and personal effects.	
<input checked="" type="checkbox"/> Aff.Mail W/	Michael Gillespie - \$117,148.25	
<input type="checkbox"/> Aff.Pub.	Michaela Gillespie - \$117,148.25	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input 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: KT
		Reviewed on: 3/25/16
		Updates:
		Recommendation:
		File 4E- De La Mora

Petition for Withdrawal of Funds from Blocked Account

DOD: 8/25/12		<p>DELIA GONZALEZ, Administrator, is petitioner.</p> <p>Petitioner states there is currently the balance of \$254,466.27 in a blocked account at Premier Valley Bank.</p> <p>Petitioner requests the authority to withdraw said funds, for the purpose of final distribution, and distribute the as follows:</p> <ul style="list-style-type: none"> • \$117,148.25 payable to Michael Gillespie. • \$117,148.25 payable to Michaela Gillespie • \$20,169.77 plus accrued interest to Delia Gonzalez, Administrator of the Estate of Francisco J. De La Mora. 	<p>NEEDS/PROBLEMS/COMMENTS:</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			
		Reviewed by: KT		
		Reviewed on: 3/25/16		
		Updates:		
		Recommendation:		
		File 4B- De La Mora		

Petition for Withdrawal of Funds from Blocked Account

DOD: 8/25/12	DELIA GONZALEZ , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	Petitioner states there is currently the balance of \$2,997.18 in a blocked account at Central Valley Community Bank.	
<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	Petitioner requests the authority to withdraw said funds, for the purpose of final distribution, and distribute the as follows:	
<input checked="" type="checkbox"/> Aff.Mail	W/	
<input type="checkbox"/> Aff.Pub.	<ul style="list-style-type: none"> \$2,997.18 plus accrued interest to Delia Gonzalez, Administrator of the Estate of Francisco J. De La Mora. 	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 3/25/16
		Updates:
		Recommendation:
		File 4C- De La Mora

Petition for Withdrawal of Funds from Blocked Account

DOD: 8/25/12	DELIA GONZALEZ , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	Petitioner states there is currently the balance of \$167,163.04 in a blocked account at Wells Fargo Bank.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory	Petitioner requests the authority to withdraw said funds, for the purpose of final distribution, and distribute the as follows:	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	W/ <ul style="list-style-type: none"> • \$113,814.91 to Rafael De La Mora. • \$47,025.58 to Public Guardian for the benefit of Francisco De La Mora. • \$6,332.55 plus accrued interest to Delia Gonzalez, Administrator of the Estate of Francisco J. De La Mora. 	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 3/25/16
		Updates:
		Recommendation:
		File 4D- De La Mora

Petition for Withdrawal of Funds from Blocked Account

DOD: 8/25/12	DELIA GONZALEZ , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	Petitioner states there is currently the balance of \$48,965.02 in a blocked account at J.P. Chase Morgan Bank.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory	Petitioner requests the authority to withdraw said funds, for the purpose of final distribution, and distribute the as follows:	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	W/ <ul style="list-style-type: none"> • \$48,965.02 to Public Guardian for the benefit of Francisco De La Mora. • Any accrued interest to Delia Gonzalez, Administrator of the Estate of Francisco J. De La Mora. 	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 3/25/16
		Updates:
		Recommendation:
		File 4A- De La Mora

Attorney Gary G. Bagdasarian (for Administrator Jesus M. Mejia)

Probate Status Hearing Re: Filing of the First Account or Final Distribution

DOD: 6/12/1994	JESUS M. MEJIA , son, was appointed Administrator with Limited IAEA authority without bond on 12/3/2014.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need first and final account, or verified status report pursuant to Probate Code § 12200, and proof of service of notice of the status hearing pursuant to Local Rule 7.5(B).</p> <p>Note: Order Confirming Sale of Real Property filed 12/3/2015 confirms the sale of estate real property for the price of \$85,000.00; Receipt and Acknowledgement of Order for the Deposit of Money into Blocked Account filed 3/9/2016 shows a blocked account of \$52,622.59.</p>
Cont. from	Letters issued on 12/4/2014.	
<input type="checkbox"/> Aff.Sub.Wit.	Pursuant to Probate Code § 8800(b) , Final Inventory and Appraisal was filed 12/16/2014 showing an estate value of \$70,000.00 .	
<input type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	Pursuant to Probate Code § 12200 , first account and/or petition for final distribution was due 12/4/2015.	
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Minute Order dated 12/3/2014 from the hearing on the petition for letters of administration set this status hearing on 3/30/2016 for filing of the first account and/or petition for final distribution.	
<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: 3/24/16
		Updates:
		Recommendation:
		File 5- Mejia

Status RE: Filing of the First Account

	DAN HABIB , Son, was appointed Conservator of the Estate with bond of \$294,360.00 on 1/26/15. Bond was filed and Letters issued on 2/17/16.	NEEDS/PROBLEMS/COMMENTS: 1. Need first account per Probate Code §2620.
	The FRESNO COUNTY PUBLIC GUARDIAN was appointed Conservator of the Person on 1/26/15.	
	At the hearing on 1/26/15, the Court set this status hearing for the filing of the first account.	
	Status Report of Counsel filed 3/25/16.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 3/24/16
		Updates: 3/28/16
		Recommendation:
		File 6- Habib

Attorney Thomas L. McCormick, of Menlo Park (for Beverly H. Leach, Executor)

Order to Show Cause Re: Failure to File the Inventory and Appraisal

DOD: 08/14/14	BEVERLY H. LEACH , spouse, was appointed Executor with full IAEA and without bond on 09/01/15.	NEEDS/PROBLEMS/COMMENTS:
		<u>Continued from 3/9/2016, as to Beverly Leach only.</u> Minute Order states the Order to Show Cause is vacated as to Mr. McCormick, but continued as to Beverly Leach. Mr. McCormick is reminded of his 11/2/2016 status hearing date for filing of the first or final account. Beverly Leach is ordered to be personally present or present via CourtCall on 3/30/2016, or the Court will remove her as Executor on that date.
Cont. from 030916	Minute Order from 09/01/15 set this status hearing regarding filing of the Inventory & Appraisal.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory	Minute Order dated 2/3/2016 states:	
<input type="checkbox"/> PTC	<ul style="list-style-type: none"> • NO APPEARANCES; • The Court issues an Order to Show Cause to Thomas L. McCormick as to why he should not be sanctioned for his failure to appear today, and to Beverly Leach as to why she should not be removed as Executor for her failure to file the Inventory and Appraisal; • Both Thomas L. McCormick and Beverly Leach are ordered to be personally present in court or appear via CourtCall on 3/9/2016. 	Note: Clerk's Certificate of Mailing shows a copy of the Minute Order dated 3/9/2016 was mailed to Beverly Leach on 3/10/2016.
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		Note: Final Inventory and Appraisal filed 2/19/2016 shows an estate value of \$254,821.04.
<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	Clerk's Certificate of Mailing shows a copy of the Minute Order dated 2/3/2016 was mailed to Attorney McCormick and Beverly Leach on 2/3/2016.	
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		Reviewed by: JF / LEG
<input type="checkbox"/> Status Rpt		Reviewed on: 3/23/16
<input type="checkbox"/> UCCJEA		Updates:
<input type="checkbox"/> Citation		Recommendation:
<input type="checkbox"/> FTB Notice		File 7- Leach

Order to Show Cause RE: Failure to File a Completed Inventory and Appraisal

DOD: 9/26/14	<p>THOMAS RUFF was appointed Executor with full IAEA authority and without bond on 10/1/15.</p> <p>Letters issued on 10/2/15.</p> <p>Minute order dated 10/1/15 set a status hearing on 2/24/16 for the filing of the inventory and appraisal.</p> <p>Inventory and Appraisal filed on 10/14/15 was incomplete. #1 and #2 of the form was blank. This section indicates the total appraised by the personal representative and the total appraised by the probate referee.</p> <p>Corrected Inventory and Appraisal filed on 3/9/16 showing the estate valued at \$200,000.00</p> <p>Minute order dated 2/24/16 indicated there were not appearances at the hearing. This Order to Show Cause was set to Jeff Pape as to why he should not be sanctioned for his failure to appear and to Thomas Ruff as to why he should not be removed as Executor for his failure to file a completed inventory and appraisal. Both Mr. Pape and Mr. Ruff are ordered to be personally present or present via CourtCall on 3/30/16.</p> <p style="text-align: center;">Please see additional page</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Declaration of Jeffrey Pape does not show it was served on Department of Health Care services pursuant to the Request for Special Notice filed on 11/30/15. 2. Corrected Inventory and Appraisal does not show it was served on Department of Health Care services pursuant to the Request for Special Notice filed on 11/30/15.
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 3/25/16
		Updates:
		Recommendation:
		File 8- Carey

Declaration of Jeffrey Pape re: Order to Show Cause filed on 3/1/16 states a corrected inventory and appraisal has been sent to the probate referee, Rick Smith. Mr. Smith's office confirmed with Mr. Pape's office that it is his practice to complete lines 1 and 2 of the inventory and appraisal then total the values. Nevertheless, Mr. Pape's office failed to notice the omitted information prior to filing and mistakenly thought the inventory and appraisal had been properly and timely filed. Thus, his office did not review the probate notes to see if there was an issue with the inventory.

If sanctions are appropriate, the sanctions should only be imposed on declarant, not Petitioner, as the error was not a result of Petitioner's actions.

Probate Status Hearing Re: Proof of Funds deposited into blocked account

DOD: 6/18/15	<p>KENNITH E. HORN, Son, was appointed Administrator with Limited IAEA without bond on 11/3/15.</p> <p>I&A filed 12/21/15 included real property valued at \$80,000 plus a vehicle and misc. personal property.</p> <p>Pursuant to Report of Sale heard on 2/18/16, the Court's Order Confirming Sale of Real Property required that the proceeds of the sale be deposited into a blocked account at California Bank & Trust.</p> <p>The Court set this status hearing for the filing of the receipt for blocked account.</p> <p>Status Report filed 3/23/16 states an escrow is scheduled to close on or about 3/31/16 or 4/1/16. Therefore, continuance of 30 days is requested.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 2/18/16: Overbid in the amount of \$78,150 is accepted. Cashier's check in the amount of \$10,000 from CVI Group is given to Gary Bagdasarian. All funds are to be placed into a blocked account. The Court needs proof that Kenneth Horn's active bench warrant has been taken care of.</p> <p>Note: Documentation of recall of warrant was filed 3/23/16.</p> <p>1. Need receipt for blocked account.</p>
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>Reviewed by: skc</p>	
	<p>Reviewed on: 3/24/16</p>	
	<p>Updates:</p>	
	<p>Recommendation:</p>	
	<p>File 9A- Clark</p>	

10A Ismael Romo, JR, Israel Romo, Sariah Romo, Samad Walton, JR, Samaria Walton (GUARD/P) **Case No. 15CEPR01162**

Petitioner: Darlene Jones (pro per)

Objector: Ismael Romo (pro per)

Petition for Appointment of Guardian of the Person

	<p>THERE IS NO TEMPORARY. No temporary was requested.</p> <p>DARLENE ELAINE JONES, maternal grandmother is petitioner.</p> <p>Please see petition for details.</p> <p>Objections of father, Ismael Romo, filed on 1/25/16.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Please see page 10B for competing petition.</p>
Cont. from 020216		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Court Investigator Report filed on 3/22/16	
<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.	W/	
<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"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 3/23/16
		Updates:
		Recommendation:
		File 10A-Romo & Walton

10B Ismael Romo, JR, Israel Romo, Sariah Romo, Samad Walton, JR, Samaria Walton (GUARD/P)
Case No. 15CEPR01162

Petitioner: Sylvia Romo (pro per)
 Petitioner: Marin Romo (pro per)

Petition for Appointment of Guardian of the Person

	<p>THERE IS NO TEMPORARY. No temporary was requested.</p> <p>SYLVIA ROMO and MARIN ROMO, paternal grandparents, are petitioners.</p> <p>Please see petition for details.</p> <p>Court Investigator Report filed on 3/22/16.</p>		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>This petition is for ISMAEL, JR., ISRAEL AND SARIAH only.</p> <ol style="list-style-type: none"> 1. Need proof of personal service of the Notice of Hearing or Consent and Waiver of Notice or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. Darlisha Lee (mother) – <i>Declaration filed on 3/23/16 indicating service to mom was unsuccessful.</i> 2. Need proof of service of the Notice of Hearing or Consent and Waiver of Notice or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. Ronnie Lee (maternal grandfather)
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 type="checkbox"/> Aff.Mail			X
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			X
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input checked="" type="checkbox"/> CI Report			
<input 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			
			<p>Reviewed by: KT</p> <p>Reviewed on: 3/23/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 10B- Romo/ Walton</p>

11A Justin Vaden Breitwieser (GUARD/P)

Case No. 15CEPR01203

Petitioner: Monica Letitia Rocha (pro per)

Petitioner: Jarod Edward Rocha (pro per)

Petitioner: Twyla G. Klein (pro per)

Objector: Soliel Phariss (pro per)

Petition for Appointment of Guardian of the Person

		<u>TEMPORARY EXPIRES ON 2/17/16</u>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Declaration Under Uniform Child Custody Jurisdiction and Enforcement Act (UCCJEA).</p>
		<p>MONICA LETITIA ROCHA, maternal grandmother, JEROD EDWARD ROCHA, maternal step-grandfather and TWYLA G. KLEIN, paternal great-grandmother, are petitioners.</p>	
		Please see petition for details.	
Cont. from 021716		Objections of mother filed on 3/30/16	
	Aff.Sub.Wit.	Court Investigator Report filed on 3/23/16	
✓	Verified	Declaration of Twyla G. Klein filed on 3/24/16	
	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		
	Aff. Posting		
	Status Rpt		
	UCCJEA	X	
	Citation		
	FTB Notice		
			<p>Reviewed by: KT</p> <p>Reviewed on: 3/24/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11A- Breitwieser</p>

Petitioner: Soliel Phariss (pro per)

Objector: Justin Breitwieser (pro per)

Petition for Visitation

		SOLIEL PHARISS , mother, is petitioner.	NEEDS/PROBLEMS/COMMENTS:	
		Please see petition for details.		
Cont. from		Objections of father, Justin Breitwieser, filed on 3/23/16		
<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"/>	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: KT	
			Reviewed on: 3/24/16	
			Updates:	
			Recommendation:	
			File 11B- Breitwieser	

Petition for Appointment of Guardian of the Person

	<u>TEMPORARY EXPIRES 3/30/2016</u>	NEEDS/PROBLEMS/COMMENTS:
	ARTHUR LEE COLLINS , non-relative (step-father), is petitioner and was appointed temporary guardian of the person on 2/9/2016.	<ol style="list-style-type: none"> 1. Need proof of personal service 15 days prior to court hearing of <i>Notice of Hearing</i> with copy of petition <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence for: <ol style="list-style-type: none"> a. Dionne M. Singleton (father) 2. Need proof of mailed service 15 days prior to court hearing of <i>Notice of Hearing</i> with copy of petition <u>or</u> consents and waiver of notice <u>or</u> declaration of due diligence for: <ol style="list-style-type: none"> a. Arthur Lee Collins IV (brother) b. Jordan Collins (brother) c. Maternal grandfather 3. UCCJEA form indicates minor has resided with Petitioner since 11/10/2015, but does not include the minor's residence information for the past five years, as required.
	<i>See petition for details.</i>	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	x	
<input type="checkbox"/> Aff.Mail	x	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	x	
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> DSS Report		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: SEF
		Reviewed on: 3/24/2016
		Updates:
		Recommendation:
		File 12- Singleton

Petition for Order Establishing Special Needs Trust

			<p>STEVIE UNDERWOOD, by and through her Guardian ad Litem MARIDAUN DEFOREST, is Petitioner.</p> <p style="text-align: center;">See petition for details.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> Ms. DeForest's standing as GAL is contingent on her appointment pursuant to the petition at Page A.</p> <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p>
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg	X		
✓	Aff.Mail	W		
	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			
			Reviewed by: skc	
			Reviewed on: 3/25/16	
			Updates:	
			Recommendation:	
			File 15B- Underwood	

NEEDS/PROBLEMS/COMMENTS:

1. Notice of Hearing was served only on the agencies required at Probate Code §3602(f), but was not served on the proposed beneficiary, the proposed trustee, the proposed alternate trustee, or any other interested persons. Therefore need continuance for proper notice to the following:
 - Proposed beneficiary Stevie Underwood
 - Proposed trustee Maridaun DeForest
 - Proposed alternate trustee Neoala DeForest
 - Other remainder beneficiaries (see #2 below)

Note: The Court may require clarification regarding the named alternate trustee Neoala DeForest. How is this person related to the beneficiary?

Note: Although Maridaun DeForest is technically the petitioner herein, she is not represented by the filing attorney, who in fact represents the insurance agency that will be funding the trust based on a settlement with Ms. DeForest on Ms. Underwood's behalf. Therefore, despite Probate Code §1201 not requiring notice to self, it appears notice to Ms. DeForest is appropriate in this instance.

2. The trust at Article Six, provides that if the beneficiary leaves no spouse or issue, then her mother, Maridaun DeForest, is the remainder beneficiary. However, pursuant to intestate succession §6402(b), both parents would be her heirs. Therefore, need clarification regarding the omission of Stevie Underwood's father from this section. Notice of Hearing should also be given to the father as an interested person.
3. It is the policy of the Court to require Court approval for major purchases (over \$2,000.00), which after purchase become assets of the trust. See Local Rule 7.19.B. It appears this language should be added to Article Three. Need revised proposed trust.
4. The trust should include a "Schedule A" which lists the assets that will fund the special needs trust. See Local Rule 7.19.A.

Note: Given the proposed value (\$13,500.00), the Court may require further information regarding Petitioner's plans for use of the funds. Does Petitioner intend to make one or a few large purchases, such as a vehicle or a residence (per Article Seven, Section 5), or does Petitioner intend to maintain the funds in the trust for smaller special needs of the beneficiary?

5. Petitioner requests bond be waived pursuant to Probate Code §§ 2323, 2628 given the value of the trust (See Article Eight, Section 1; Cal. Rule of Court 7.903(d); however, it is the policy of the Court to require blocked account in lieu of bond. Therefore, if bond of \$14,850.00 is not required pursuant to Cal. Rules of Court 7.903(c), 7.207, Probate Code §2320(c), need Order to Deposit Money Into Blocked Account (MC-355), and the Court will set a status hearing for the filing of the receipt (MC-356).

SEE ADDITIONAL PAGES

NEEDS/PROBLEMS/COMMENTS (Cont'd):

6. Petitioner requests the Court waive accountings (See Article Eight, Section 4) pursuant to Cal. Rule of Court 7.903(d), given the value of the trust; however, it is the policy of the Court to require at least a first account pursuant to Probate Code §2620(a) prior to waiver of *further* accounts. See Local Rule 7.8 re blocked accounts. If a first account is required, the Court may set a status hearing for its filing.
7. Need order. Local Rule 7.1.1.F.

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

- Wednesday, May 11, 2016 for the filing of bond of \$14,850.00 or receipt for blocked account (MC-356), as required.
- Wednesday, May 31, 2017 for the filing of the first account, if required.

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

Petitioner Mee Saephan (Pro Per)

Petition for Appointment of Guardian of the Estate

		NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
		MEE SAEPHAN , mother, is Petitioner and requests appointment as Guardian of the Estate.	<ol style="list-style-type: none"> Pursuant to Probate Code § 1511(c), need Notice of Hearing and proof of service of the Notice of Hearing by mail at least 15 days before the hearing to the following persons: <ul style="list-style-type: none"> Dion H. Nunez, Sr., paternal grandfather; Yolanda Zavala, paternal grandfather; Tonwa Saephan, maternal grandfather. Item 7 of the <i>Petition</i> is incomplete regarding the value of the funds to be received, and Item 1(c) of the <i>Petition</i> is incomplete regarding the need for a blocked account. Local Rule 7.8.1(l) provides that absent a showing of good cause, it is the policy of the Court to block all funds in guardianship estates. Need information regarding the amount of the life insurance deposits to be placed in a blocked account, and the name and address of the financial institution at which the funds will be placed.
		~Please see Petition for details~	
Cont. from			
	Aff.Sub.Wit.		
✓	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		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 3/25/16
			Updates:
			Recommendation:
			File 16- Nunez

16 Additional Page, Andrew King Nunez (GUARD/E) Case No. 16CEPR00194

NEEDS/PROBLEMS/COMMENTS, continued:

3. Item 6 of *Confidential Guardian Screening* form filed on 2/22/2016 is incomplete.
4. *UCCJEA* filed 2/22/2016 does not include any dates for the period of residence of the child at the address listed.

Notes:

- Proposed *Order Appointing Guardian of Minor* has been altered at Item 9(c) to specifically reflect that deposits of all life insurance funds will be placed in a blocked account at a financial institution to be identified and provided to the Court by the Petitioner.
- Proposed *Order to Deposit Money into Blocked Account* has been prepared and placed in the file for the Court's signature.
- Blank copy of a *Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked Account* (Judicial Council form MC-356) has been placed in the file for the Petitioner's use. Petitioner must file this receipt with the Court within 15 days of the deposit into the blocked account.
- If *Petition* is granted, the Court will set the following status hearings:
 - **Monday, May 2, 2016, at 9:00 a.m. in Dept. 303 for filing receipt of funds in blocked accounts; (The Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked Account, Judicial Council form MC-356, is required to be filed with the Court within 15 days after deposit.)**
 - **Monday, August 1, 2016, at 9:00 a.m. in Dept. 303 for the filing of the inventory and appraisal; and**
 - **Tuesday, May 20, 2017, at 9:00 a.m. in Dept. 303 for the filing of the first account of the guardianship estate.**

Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.

17 Emit Apple (Spousal)

Case No. 16CEPR00201

Attorney Matsumoto, Russell D. (for Cleo Apple – Petitioner – Spouse)

Spousal or Domestic Partner Property Petition

DOD: 10/11/2014		<p>CLEO APPLE, surviving spouse, is petitioner.</p> <p>No other proceedings.</p> <p>Will dated 06/12/2000 devises the real property to the Vern and Cleo Apple 2000 Revocable Trust.</p> <p>Petition requests Court confirmation that the real property located in Fresno County pass to the petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. The will devises the property in question to the Vern and Cleo Apple 2000 Revocable Trust not the petitioner therefore this procedure cannot be used.</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		
		<p>Reviewed by: LV</p> <p>Reviewed on: 03/25/2016</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 17- Apple</p>	

DOD: 11/13/2015	SUSANA BUSBY , surviving spouse, and ROBERT BUSBY , son (a minor), are petitioners.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Petitioner Susana Busby signed on behalf of the petitioner, Robert Busby, a minor. It does not appear that Ms. Busby has the authority to sign on behalf his behalf. In order to have authority to sign on behalf of the minor, Ms. Busby would have to be appointed Guardian of the Estate of the minor. Note: Guardianship of the Estate would have to be commenced in a separate proceeding. Attorney Kucera did not sign the Inventory and Appraisal.
	40 days since DOD	
Cont. from 031616	No other proceedings	
<input type="checkbox"/> Aff.Sub.Wit.	Decedent died intestate	
<input checked="" type="checkbox"/> Verified	Petitioners request Court determination that decedent's 100% interest in real property located at 2003 Mayfair Drive East, Fresno Ca. pass ½ to Susana Busby and ½ to Robert Busby pursuant to intestate succession.	
<input checked="" 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		
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		Reviewed by: LV
		Reviewed on: 03/28/2016
		Updates:
		Recommendation:
		File 18- Busby

Petitioner Stephen D. Anderson (Pro Per)
 Petitioner Ann P. Anderson (Pro Per)

Petition for Appointment of Temporary Guardian of the Person and Estate

		<p>TEMPORARY GRANTED EX PARTE EXPIRES 3/30/2016</p> <p><u>General Hearing set for 5/23/2016</u></p> <p>STEPHEN D. ANDERSON and ANN P. ANDERSON, maternal grandparents, are Petitioners.</p> <p>~Please see Petition for details~</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Petitioners state that the current value of the mother's estate, life insurance policies, etc., are unknown at this time. Item 7 of the <i>Petition</i> regarding character and estimated value of the estate indicates the estate is "to be determined." The Court cannot exercise oversight of property of the child that is not currently existing nor anticipated to be received by the child in the near future. Unless the Petitioners know or have reason to know of life insurance funds or an inheritance that will with certainty be soon received by the child from an identified and specific source that Petitioner can demonstrate to the Court, the petition for guardianship of the estate should be denied and dismissed for lack an estate of the child at this time.</p> <p>~Please see additional page~</p>																																																																				
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