



## 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.

Atty Matlak, Steven M., of Dowling Aaron Inc. (for Petitioner Bruce D. Bickel, Trustee)

**Petition for Settlement of First Account Current and Report of Trustee; and for Approval of Attorney's Fees and Costs**

<b>Age: 9 years</b>		<p><b>BRUCE D. BICKEL</b>, Trustee of the <b>AIDAN O'CONNOR SPECIAL NEEDS TRUST</b> established 3/20/2012, is Petitioner.</p> <p><b>Account period: 3/20/2012 – 1/15/2013</b></p> <table border="0"> <tr> <td>Accounting</td> <td>-</td> <td><b>\$222,197.79</b></td> </tr> <tr> <td>Beginning POH</td> <td>-</td> <td><b>\$222,197.79</b></td> </tr> <tr> <td>Ending POH</td> <td>-</td> <td><b>\$216,161.89</b></td> </tr> <tr> <td>Trustee</td> <td>-</td> <td><b>not requested</b></td> </tr> <tr> <td>Attorney</td> <td>-</td> <td><b>\$2,620.50</b></td> </tr> </table> <p>(per Declaration filed 3/21/2013, itemized on Exhibit B, period from 12/2/2011 – 1/28/2013 for 14.30 hours @ attorney/paralegal rates from \$330.00 to \$75.00; includes \$200 costs.)</p> <table border="0"> <tr> <td>Bond</td> <td>-</td> <td><b>\$276,110.69</b></td> </tr> </table> <p>(sufficient)</p> <p><b>Petitioner states:</b></p> <ul style="list-style-type: none"> <li>As a result of the Litigation Settlement in Los Angeles Superior Court, the Trust received [<b>\$222,197.79</b>] in cash, and an annuity was purchased issued by Metropolitan Life, Inc., in the amount of <b>\$1,100,000.00</b>, which will pay <b>\$3,750.81</b> monthly for life beginning 2/20/2014 (copy of annuity attached as Exhibit B);</li> <li>Petitioner has not kept all cash invested in interest-bearing accounts, as he was able to open a free checking account at Yosemite Bank without any monthly charges only if no interest were to accrue; it was determined that if Petitioner opened an interest-bearing checking account, the service charges would be in excess of the earned interest;</li> </ul> <p><b>~Please see additional page~</b></p>	Accounting	-	<b>\$222,197.79</b>	Beginning POH	-	<b>\$222,197.79</b>	Ending POH	-	<b>\$216,161.89</b>	Trustee	-	<b>not requested</b>	Attorney	-	<b>\$2,620.50</b>	Bond	-	<b>\$276,110.69</b>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> Court will set a status hearing as follows:</p> <ul style="list-style-type: none"> <li><b>Friday, June 12, 2015 at 9:00 a.m. in Dept. 303</b> for filing of the second account.</li> </ul> <p>Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the dates listed, the hearing will be taken off calendar and no appearance will be required.</p> <p><b>~Please see additional page~</b></p>
Accounting	-		<b>\$222,197.79</b>																		
Beginning POH	-		<b>\$222,197.79</b>																		
Ending POH	-		<b>\$216,161.89</b>																		
Trustee	-		<b>not requested</b>																		
Attorney	-		<b>\$2,620.50</b>																		
Bond	-		<b>\$276,110.69</b>																		
<b>Cont. from</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 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 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>2620</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>																				
		<p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 4/2/13</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 1 – O'Connor</b></p>																			

**Petitioner states, continued:**

- Petitioner initially held the money at the Yosemite Bank checking account to provide flexibility for quicker withdrawals while Petitioner familiarized himself with Aiden's financial needs; within the last year, Petitioner has evaluated the financial needs of Aiden, and based thereon, intends to move the bulk of the money into longer-term investments with Merrill Lynch within the next month for a better return to the Special Needs Trust;
- On 3/20/2012, the Court authorized Petitioner as Trustee to receive payments of fees each month at the rate of **\$150.00** per hour for services rendered in connection with the administration of the Trust, but not to exceed **\$1,000.00** in any given month, with reimbursement for any excess fees of **\$1,000.00** requiring Court approval; at this time, there is no excess requested from Petitioner.

**Petitioner prays for an Order:**

1. Approving, allowing and settling the First Account and Report of the Trustee, and ratifying, approving and confirming all acts and transactions of the Petitioner as Trustee set forth in the account;
2. Authorizing and directing Petitioner to pay the Attorney fees and reimbursement of costs; and
3. Authorizing Petitioner to pay the annual premium for the bond [of ~ **\$1,091.00**] from the cash assets of the Trust estate without further Court order.

**Note re Expenditures for Special Needs:** *Petition for Order Establishing Special Needs Trust* filed 12/14/2011 for the establishment of this SNT states that Aidan was diagnosed with Autistic Disorder, has a considerable disability with low intellectual abilities and motor skills, and will require continued multiagency collaboration and treatment as he faces greater demands (*please refer to Exhibit A attached to said Petition for a copy of Medical Report of Howard Glidden, Ph.D.*) Schedule D, *Disbursements* as part of the instant *Petition* shows a total of **\$6,035.90** was disbursed in May 2012 from the SNT assets during this account period, which amount was expended for court-approved attorney fees (**\$4,895.00**), bond premium (**\$1091.00**), and check printing costs (**\$49.90**). (No Trustee fees have been paid or are requested in the instant *Petition*.) The instant *Petition* states Petitioner initially kept the SNT assets in a checking account to provide flexibility for quicker withdrawals while Petitioner familiarized himself with Aiden's financial needs; within the last year, Petitioner has evaluated the financial needs of Aiden, and based upon that evaluation, intends to move the bulk of the money into longer-term investments. In light of the fact that the monthly annuity payments to Aiden will not commence until **2/20/2014**, the Court may require further information regarding the financial needs of the Beneficiary as determined by the Petitioner, and whether any expenditures for the Beneficiary's special needs are anticipated from the current property on hand, based upon Petitioner's plan to place the funds into long-term investments that might restrict the Trustee's ability to make expenditures for the Beneficiary's special needs when necessary.

**Note re Workers' Compensation Benefits:** *Minute Order* dated 1/31/2012 from the hearing on the *Petition for Order Establishing Special Needs Trust* states, in pertinent part, that Mr. Matlak notes Aidan is entitled to workers' compensation benefits and his firm has hired an attorney who specializes in workers' compensation claims. *Exhibit B* attached to the *Declaration of Steven M. Matlak in Support of Request for Attorney's Fees and Costs* filed 2/21/2013 contains one entry dated 1/25/2012 stating "Telephone conference with Mr. Bell regarding workers' compensation benefits in relation to the special needs trust." The instant *Petition* filed 2/21/2013 is silent regarding the status of the workers' compensation benefits to which the Beneficiary is entitled as Attorney Matlak indicated to the Court on 1/31/2012. Court may require further information regarding the status of the workers' compensation benefits claim pursued on behalf of the SNT Beneficiary.

**Petition for Letters of Administration; Authorization to Administer Under the Independent Administration of Estate Act**

<b>DOD: 3/20/12</b>	<b>STEVEN W. SOUZA</b> , son, is petitioner and requests appointment as Administrator without bond.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need waiver of bond from surviving spouse, Manuel Souza, Sr. or bond set at \$225,000.00</li> <li>2. Need Notice of Petition to Administer the Estate.</li> <li>3. Need proof of service of the Notice of Petition to Administer the Estate on:             <ol style="list-style-type: none"> <li>a. Manuel Souza, Sr.</li> <li>b. Louie Souza</li> <li>c. Manuel Souza, Jr.</li> </ol> </li> </ol> <p><b>Note:</b> If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> <li>• <b>Friday, September 6, 2013</b> at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.</li> <li>• <b>Friday, June 6, 2014</b> at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
<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>	Residence: Clovis	
<input type="checkbox"/> <b>PTC</b>	Publication: Fresno Business Journal	
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>		
<input type="checkbox"/> <b>Aff.Mail</b>	<b>Estimated value of the Estate:</b>	
<input checked="" type="checkbox"/> <b>Aff.Pub.</b>	<b>Real property -       \$275,000.00</b>	
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>	<b>Probate Referee: Steven Diebert</b>	
<input 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 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: KT</b>
		<b>Reviewed on: 4/2/13</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 5 - Souza</b>

Atty O'Grady, John E., of O'Grady Law Group, San Francisco (for Petitioner Aspen Bell)

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

<b>DOD: 11/27/2012</b>	<b>ASPEN BELL</b> , daughter and named Co-Executor without bond, is Petitioner. <i>(Named Co-Executors decline to act and waive bond.)</i>		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 3/19/2013.</b> Minute Order states the Court notes for the minute order that there is no appearance by counsel telephonically or otherwise. Matter continued to 4/9/2013.</p> <p>The following note from the last hearing remains:</p> <p><b>Note:</b> Proposed personal representative is a resident of Greenwood, Delaware. Court may require bond if the proposed personal representative resides outside California or for other good cause, even if the will waives bond, pursuant to California Rule of Court 7.201 (b) and Probate Code § 8571. Court may require Petitioner to post bond in the sum of <b>\$215,980.00</b>.</p> <p><b>Note:</b> If petition is granted, Court will set status hearings as follows:</p> <ul style="list-style-type: none"> <li>• Friday, May 10, 2013 at 9:00 a.m. in Dept. 303 for filing proof of bond, <b><i>if Court requires bond</i></b>;</li> <li>• Friday, September 13, 2013 at 9:00 a.m. in Dept. 303 for filing of inventory and appraisal; and</li> <li>• Friday, June 13, 2014 at 9:00 a.m. in Dept. 303 for filing of first account and/or petition for final distribution.</li> </ul> <p>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.</p> <p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 3/29/13</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 6 - Gintz</b></p>
<b>Cont. from 031913</b>	Full IAEA – O.K.		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	<input type="checkbox"/> S/ <input type="checkbox"/> P		
<input checked="" type="checkbox"/> <b>Verified</b>	<input type="checkbox"/>	Will Dated: 5/23/1997	
<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"/>	Residence: Fresno	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	<input type="checkbox"/>	Publication: The Business Journal	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	<input type="checkbox"/> W <input type="checkbox"/> / <input type="checkbox"/> O		
<input checked="" type="checkbox"/> <b>Aff.Pub.</b>	<input type="checkbox"/>	<b>Estimated value of the Estate:</b>	
<input type="checkbox"/> <b>Sp.Ntc.</b>	<input type="checkbox"/>	Real property - \$165,000.00	
<input type="checkbox"/> <b>Pers.Serv.</b>	<input type="checkbox"/>	Personal property - \$47,500.00	
<input type="checkbox"/> <b>Conf. Scrn</b>	<input type="checkbox"/>	Annual income from PP - <b>\$ 3,840.00</b>	
<input type="checkbox"/> <b>Aff. Posting</b>	<input type="checkbox"/>	Total - <b>\$215,980.00</b>	
<input checked="" type="checkbox"/> <b>Duties/S</b>	<input type="checkbox"/>		
<input type="checkbox"/> <b>Objections</b>	<input type="checkbox"/>	<b>Probate Referee: Rick Smith</b>	
<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 checked="" type="checkbox"/> <b>Letters</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"/>		



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

<b>DOD: 12/19/2013</b>		<p><b>FRANK MILLIGAN</b>, named executor without bond, is petitioner.</p> <p>Full IAEA – o.k.</p> <p>Will dated: 1/15/1999</p> <p>Residence: Fresno</p> <p>Publication: Fresno Business Journal</p> <p><b>Estimated Value of the Estate:</b></p> <table> <tr> <td>Personal Property</td> <td>-</td> <td>\$ 42,000.00</td> </tr> <tr> <td>Annual Income</td> <td>-</td> <td>\$ 2,000.00</td> </tr> <tr> <td>Real property</td> <td>-</td> <td>\$125,000.00</td> </tr> <tr> <td><b>Total</b></td> <td>-</td> <td><b>\$169,000.00</b></td> </tr> </table> <p><b>Probate Referee – Steven Diebert</b></p>	Personal Property	-	\$ 42,000.00	Annual Income	-	\$ 2,000.00	Real property	-	\$125,000.00	<b>Total</b>	-	<b>\$169,000.00</b>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> <li>• <b>Friday, September 6, 2013</b> at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.</li> <li>• <b>Friday, June 6, 2014</b> at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
Personal Property	-		\$ 42,000.00												
Annual Income	-		\$ 2,000.00												
Real property	-		\$125,000.00												
<b>Total</b>	-		<b>\$169,000.00</b>												
<b>Cont. from</b>															
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		S/P												
<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>														
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>		W/O												
<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 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>														
			<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 4/2/13</b></p> <p><b>Updates:</b></p> <p><b>Recommendation: SUBMITTED</b></p> <p><b>File 8 - Wisener</b></p>												

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

<b>DOD: 11/18/2011</b>		<p><b>MANUEL ALEZ CAMARENA</b>, son, is petitioner.</p> <p>40 days since DOD.</p> <p>No other proceedings.</p> <p>Will dated: 9/11/2008 devises the entire estate to decedent's son, Manuel Alex Camarena.</p> <p>I &amp; A - <b>\$110,000.00</b></p> <p>Petitioner requests court determination that real property located at 2968 E. Santa Ana in Fresno passes to him pursuant to Decedent's Will.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>Petition requests that personal property also pass to the petitioner however there is no personal property listed in the petition or on the inventory and appraisal. (Note: Order passes the household furniture and furnishings. The court cannot pass property that has not been inventoried.)</li> <li>#9a(1) or 9a(2) of the petition was not answered re: spouse/no spouse.</li> <li>#9a(3) or 9a(4) of the petition was not answered re: registered domestic partner/no registered domestic partner.</li> <li>Inventory and Appraisal is incomplete.           <ul style="list-style-type: none"> <li>It does not include the date of death of the Decedent.</li> <li>#3 does not indicate if the property listed is all or a portion of the estate.</li> <li>#5 does not include the property tax certificate</li> </ul> </li> <li>Attachment #11 does not include the decedent's interest in the property.</li> <li>There is no record that the original Will has been deposited with the Court. Probate Code §8200</li> </ol>	
<b>Cont. from</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input checked="" type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			<input checked="" type="checkbox"/>
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input type="checkbox"/>	<b>Notice of Hrg</b>			N/A
<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 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: KT</b>		
		<b>Reviewed on: 4/2/13</b>		
		<b>Updates:</b>		
		<b>Recommendation:</b>		
		<b>File 9 - Chavez</b>		