

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

Age: 9 years		<p>BRUCE D. BICKEL, Trustee of the AIDAN O'CONNOR SPECIAL NEEDS TRUST established 3/20/2012, is Petitioner.</p> <p>Account period: 3/20/2012 – 1/15/2013</p> <table border="0"> <tr> <td>Accounting</td> <td>-</td> <td>\$222,197.79</td> </tr> <tr> <td>Beginning POH</td> <td>-</td> <td>\$222,197.79</td> </tr> <tr> <td>Ending POH</td> <td>-</td> <td>\$216,161.89</td> </tr> <tr> <td>Trustee</td> <td>-</td> <td>not requested</td> </tr> <tr> <td>Attorney</td> <td>-</td> <td>\$2,620.50</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>\$276,110.69</td> </tr> </table> <p>(sufficient)</p> <p>Petitioner states:</p> <ul style="list-style-type: none"> As a result of the Litigation Settlement in Los Angeles Superior Court, the Trust received [\$222,197.79] in cash, and an annuity was purchased issued by Metropolitan Life, Inc., in the amount of \$1,100,000.00, which will pay \$3,750.81 monthly for life beginning 2/20/2014 (copy of annuity attached as Exhibit B); 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; <p>~Please see additional page~</p>	Accounting	-	\$222,197.79	Beginning POH	-	\$222,197.79	Ending POH	-	\$216,161.89	Trustee	-	not requested	Attorney	-	\$2,620.50	Bond	-	\$276,110.69	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Court will set a status hearing as follows:</p> <ul style="list-style-type: none"> Friday, June 12, 2015 at 9:00 a.m. in Dept. 303 for filing of the second account. <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>~Please see additional page~</p>
Accounting	-		\$222,197.79																		
Beginning POH	-		\$222,197.79																		
Ending POH	-		\$216,161.89																		
Trustee	-		not requested																		
Attorney	-		\$2,620.50																		
Bond	-		\$276,110.69																		
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		<p>Reviewed by: LEG</p> <p>Reviewed on: 4/2/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1 – O'Connor</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.

Age: 17		<p>JOANNE SANOIAN, Petitioner, represents Guardians of the Person and the Guardian of the Estate of the minor Rafael De La Mora.</p> <p>Delia Gonzalez, Rafael De La Mora Martin, and Maria De Jesus Gomez Munoz were appointed Co-Guardians of the Person, and Delia Gonzalez was appointed Guardian of the Estate, on 10-31-12.</p> <p>Petitioner asks that she be paid a total of \$12,535.00 (\$4,178.50 from each minor's estate) for her services to the guardians, including establishment of temporary and permanent guardianships for all three minors, preparations of guardianship questionnaires for each of the guardians, attendance at hearings, office and telephone conferences with clients regarding distributions to the minors, telephone conferences and email correspondence with other attorneys related to the matter, preparation of Response to Amended Petition for Visitation, preparation of application for Primerica life insurance proceeds, preparation of orders and receipts for deposits of money into blocked accounts. Petitioner states the sum of \$117,353.88 is currently on deposit in this guardianship estate account.</p> <p>Attorney Joanne Sanoian: 11.40 hours @ \$300/hr (\$3,420)</p> <p>Associate Lisa Horton: 31.30 hours @ \$200/hr (\$6,260)</p> <p>Paralegal 28.55 hours @ \$100/hr (\$2,855)</p> <p><u>Note:</u> Costs (reimbursement for filing fees) are not requested from Rafael's estate; however, filing cost of \$105.15 is requested from Francisco's estate, and \$435 is requested from Fernando's estate.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 3-5-13: Counsel is directed to submit a declaration regarding the fees.</p> <p><u>Declaration filed 4-4-13 details the case history, time spent, and work performed, but does not appear to address the following items that were previously noted:</u></p> <ol style="list-style-type: none"> Pursuant to Probate Code §2640(a), a petition for attorney fees may be brought after the filing of the I&A, or any other period of time as the court for good cause orders. In this case, only a <u>partial</u> I&A has been filed. <p>The Court may require clarification regarding good cause for bringing this petition prior to the filing of the Final I&A, and also prior to the filing of the first account, as is usual practice in this Court pursuant to Local Rule 7.16.</p> <ol style="list-style-type: none"> Petitioner states the sum of \$117,353.88 is currently on deposit, and this amount is reflected on the Partial I&A filed 12.18.12. With reference to §2640 and #1 above, the Court may require further information for <i>this file</i> regarding what additional assets are expected for each minor. (The original petition indicated \$0 for the estimated estate value.) At this time, a status hearing is set for 12-6-13 re: receipt of assets from estate. Need Order, plus Order for Withdrawal of Funds from Blocked Account (MC-358).
Cont. from 030513			
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Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order	X		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: skc			
Reviewed on: 4-3-13			
Updates: 4-4-13			
Recommendation:			
File 2 – De La Mora			

Petition for Attorney Fees and Reimbursement for Costs Advanced

Age: 15	JOANNE SANOIAN , Petitioner, represents Guardians of the Person and the Guardian of the Estate of the minor Francisco De La Mora.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 3-5-13: Counsel is directed to submit a declaration regarding the fees.</p> <p><u>Declaration filed 4-4-13 details the case history, time spent, and work performed, but does not appear to address the following items that were previously noted:</u></p> <p>4. Pursuant to Probate Code §2640(a), a petition for attorney fees may be brought after the filing of the I&A, or any other period of time as the court for good cause orders. In this case, only a <u>partial</u> I&A has been filed.</p> <p>The Court may require clarification regarding good cause for bringing this petition prior to the filing of the Final I&A, and also prior to the filing of the first account, as is usual practice in this Court pursuant to Local Rule 7.16.</p> <p>5. Petitioner states the sum of \$117,353.88 is currently on deposit, and this amount is reflected on the Partial I&A filed 12.18.12. With reference to §2640 and #1 above, the Court may require further information for this file regarding what additional assets are expected for each minor. (The original petition indicated \$0 for the estimated estate value.) At this time, a status hearing is set for 12-6-13 re: receipt of assets from estate.</p> <p>6. Need Order, plus Order for Withdrawal of Funds from Blocked Account (MC-358).</p>	
Cont. from 030513	Delia Gonzalez, Rafael De La Mora Martin, and Maria De Jesus Gomez Munoz were appointed Co-Guardians of the Person, and Delia Gonzalez was appointed Guardian of the Estate, on 10-31-12.		
<input type="checkbox"/> Aff.Sub.Wit.	<p>Petitioner asks that she be paid a total of \$12,535.00 (\$4,178.50 from each minor's estate) for her services to the guardians, including establishment of temporary and permanent guardianships for all three minors, preparations of guardianship questionnaires for each of the guardians, attendance at hearings, office and telephone conferences with clients regarding distributions to the minors, telephone conferences and email correspondence with other attorneys related to the matter, preparation of Response to Amended Petition for Visitation, preparation of application for Primerica life insurance proceeds, preparation of orders and receipts for deposits of money into blocked accounts. Petitioner states the sum of \$117,353.88 is currently on deposit in this guardianship estate account.</p> <p>Attorney Joanne Sanoian: 11.40 hours @ \$300/hr (\$3,420)</p> <p>Associate Lisa Horton: 31.30 hours @ \$200/hr (\$6,260)</p> <p>Paralegal 28.55 hours @ \$100/hr (\$2,855)</p> <p><u>Note:</u> Costs (reimbursement for filing fees) are not requested from Rafael's estate; however, filing cost of \$105.15 is requested from Francisco's estate, and \$435 is requested from Fernando's estate.</p>		
<input checked="" type="checkbox"/> Verified			
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<input type="checkbox"/> FTB Notice			
<p>Reviewed by: skc</p> <p>Reviewed on: 4-3-13</p> <p>Updates: 4-4-13</p> <p>Recommendation:</p> <p>File 3 – De La Mora</p>			

Petition for Attorney Fees and Reimbursement for Costs Advanced

Age: 13		<p>JOANNE SANOIAN, Petitioner, represents Guardians of the Person and the Guardian of the Estate of the minor Fernando De La Mora.</p> <p>Delia Gonzalez, Rafael De La Mora Martin, and Maria De Jesus Gomez Munoz were appointed Co-Guardians of the Person, and Delia Gonzalez was appointed Guardian of the Estate, on 10-31-12.</p> <p>Petitioner asks that she be paid a total of \$12,535.00 (\$4,178.50 from each minor's estate) for her services to the guardians, including establishment of temporary and permanent guardianships for all three minors, preparations of guardianship questionnaires for each of the guardians, attendance at hearings, office and telephone conferences with clients regarding distributions to the minors, telephone conferences and email correspondence with other attorneys related to the matter, preparation of Response to Amended Petition for Visitation, preparation of application for Primerica life insurance proceeds, preparation of orders and receipts for deposits of money into blocked accounts. Petitioner states the sum of \$117,353.88 is currently on deposit in this guardianship estate account.</p> <p>Attorney Joanne Sanoian: 11.40 hours @ \$300/hr (\$3,420)</p> <p>Associate Lisa Horton: 31.30 hours @ \$200/hr (\$6,260)</p> <p>Paralegal 28.55 hours @ \$100/hr (\$2,855)</p> <p>Note: Costs (reimbursement for filing fees) are not requested from Rafael's estate; however, filing cost of \$105.15 is requested from Francisco's estate, and \$435 is requested from Fernando's estate.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 3-5-13: Counsel is directed to submit a declaration regarding the fees.</p> <p><u>Declaration filed 4-4-13 details the case history, time spent, and work performed, but does not appear to address the following items that were previously noted:</u></p> <p>7. Pursuant to Probate Code §2640(a), a petition for attorney fees may be brought after the filing of the I&A, or any other period of time as the court for good cause orders. In this case, only a <u>partial</u> I&A has been filed.</p> <p>The Court may require clarification regarding good cause for bringing this petition prior to the filing of the Final I&A, and also prior to the filing of the first account, as is usual practice in this Court pursuant to Local Rule 7.16.</p> <p>8. Petitioner states the sum of \$117,353.88 is currently on deposit, and this amount is reflected on the Partial I&A filed 12.18.12. With reference to §2640 and #1 above, the Court may require further information for this file regarding what additional assets are expected for each minor. (The original petition indicated \$0 for the estimated estate value.) At this time, a status hearing is set for 12-6-13 re: receipt of assets from estate.</p> <p>9. Need Order, plus Order for Withdrawal of Funds from Blocked Account (MC-358).</p>
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<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
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<input type="checkbox"/> FTB Notice			
		<p>Reviewed by: skc</p> <p>Reviewed on: 4-3-13</p> <p>Updates: 4-4-13</p> <p>Recommendation:</p> <p>File 4 – De La Mora</p>	

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

DOD: 3/20/12	STEVEN W. SOUZA , son, is petitioner and requests appointment as Administrator without bond.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need waiver of bond from surviving spouse, Manuel Souza, Sr. or bond set at \$225,000.00 2. Need Notice of Petition to Administer the Estate. 3. Need proof of service of the Notice of Petition to Administer the Estate on: <ol style="list-style-type: none"> a. Manuel Souza, Sr. b. Louie Souza c. Manuel Souza, Jr. <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Friday, September 6, 2013 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. • Friday, June 6, 2014 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. <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>
Cont. from	Full IAEA – o.k.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Decedent died intestate.	
<input type="checkbox"/> Inventory	Residence: Clovis	
<input type="checkbox"/> PTC	Publication: Fresno Business Journal	
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail	Estimated value of the Estate:	
<input checked="" type="checkbox"/> Aff.Pub.	Real property - \$275,000.00	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Probate Referee: Steven Diebert	
<input 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 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: 4/2/13
		Updates:
		Recommendation:
		File 5 - Souza

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)

DOD: 11/27/2012	ASPEN BELL , daughter and named Co-Executor without bond, is Petitioner. (Named Co-Executors decline to act and waive bond.)		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 3/19/2013. 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>Note: 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 \$215,980.00.</p> <p>Note: If petition is granted, Court will set status hearings as follows:</p> <ul style="list-style-type: none"> • Friday, May 10, 2013 at 9:00 a.m. in Dept. 303 for filing proof of bond, <i>if Court requires bond</i>; • Friday, September 13, 2013 at 9:00 a.m. in Dept. 303 for filing of inventory and appraisal; and • Friday, June 13, 2014 at 9:00 a.m. in Dept. 303 for filing of first account and/or petition for final distribution. <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>Reviewed by: LEG</p> <p>Reviewed on: 3/29/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 6 - Gintz</p>
Cont. from 031913	Full IAEA – O.K.		
<input type="checkbox"/> Aff.Sub.Wit.	<input type="checkbox"/> S/ <input type="checkbox"/> P		
<input checked="" type="checkbox"/> Verified		Will Dated: 5/23/1997	
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.		Residence: Fresno	
<input checked="" type="checkbox"/> Notice of Hrg		Publication: The Business Journal	
<input checked="" type="checkbox"/> Aff.Mail	<input type="checkbox"/> W <input type="checkbox"/> / <input type="checkbox"/> O		
<input checked="" type="checkbox"/> Aff.Pub.		Estimated value of the Estate:	
<input type="checkbox"/> Sp.Ntc.		Real property - \$165,000.00	
<input type="checkbox"/> Pers.Serv.		Personal property - \$47,500.00	
<input type="checkbox"/> Conf. Scrn		Annual income from PP - \$ 3,840.00	
<input type="checkbox"/> Aff. Posting		Total - \$215,980.00	
<input checked="" type="checkbox"/> Duties/S			
<input type="checkbox"/> Objections		Probate Referee: Rick Smith	
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input checked="" type="checkbox"/> Letters			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			

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

DOD: 11/15/12		<p>PAMELA LASSWELL, successor Trustee of the Morris E. Linder Revocable Living Trust, is Petitioner.</p> <p>40 day form DOD.</p> <p>No other proceedings.</p> <p>Will dated: 4/19/1996 devises entire estate to the Morris E. Linder Revocable Living Trust.</p> <p>I & A - \$27,500.00</p> <p>Petitioner requests court determination that Decedent's 100% interest in real property located at 3319 S. Cherry Avenue in Fresno passes to her as Trustee of the successor Trustee of the Morris E. Linder Revocable Living Trust.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
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<input type="checkbox"/>	Aff.Pub.		
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<input type="checkbox"/>	Pers.Serv.		
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<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<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: KT</p> <p>Reviewed on: 4/2/13</p> <p>Updates:</p> <p>Recommendation: SUBMITTED</p> <p>File 7 - Linder</p>	

DOD: 12/19/2013		<p>FRANK MILLIGAN, 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>Estimated Value of the Estate:</p> <p>Personal Property - \$ 42,000.00</p> <p>Annual Income - \$ 2,000.00</p> <p>Real property - \$125,000.00</p> <p>Total - \$169,000.00</p> <p>Probate Referee – Steven Diebert</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Friday, September 6, 2013 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. • Friday, June 6, 2014 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. <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>	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			S/P
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
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<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input 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 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: KT</p> <p>Reviewed on: 4/2/13</p> <p>Updates:</p> <p>Recommendation: SUBMITTED</p> <p>File 8 - Wisener</p>	

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

DOD: 11/18/2011		<p>MANUEL ALEZ CAMARENA, 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 & A - \$110,000.00</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>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 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.) #9a(1) or 9a(2) of the petition was not answered re: spouse/no spouse. #9a(3) or 9a(4) of the petition was not answered re: registered domestic partner/no registered domestic partner. Inventory and Appraisal is incomplete. <ul style="list-style-type: none"> It does not include the date of death of the Decedent. #3 does not indicate if the property listed is all or a portion of the estate. #5 does not include the property tax certificate Attachment #11 does not include the decedent's interest in the property. There is no record that the original Will has been deposited with the Court. Probate Code §8200 	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			N/A
<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 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: 4/2/13		
		Updates:		
		Recommendation:		
		File 9 - Chavez		

Atty DeMeo, Sandra B., sole practitioner of Huntington Beach (self-represented Administrator)

(1) First and Final Account and Report of Administrator and (2) Petition for Distribution of Insolvent Estate to Creditor

DOD: 3/20/2010	SANDRA B. DeMEO , Administrator appointed 7/14/2011 with Limited IAEA authority, is Petitioner.		NEEDS/PROBLEMS/ COMMENTS: 1. Need proposed order pursuant to Local Rule 7.6.1, containing a statement as to the balance of the estate on hand, and the amounts to be distributed.
	Account period: 3/20/2010 – 12/1/2012		
Cont. from	Accounting	- \$55,215.69	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH	- \$55,000.00	
<input checked="" type="checkbox"/> Verified	Ending POH	- \$45,392.50 <i>(all cash)</i>	
<input checked="" type="checkbox"/> Inventory	Administrator	- \$2,148.63 <i>(statutory)</i>	
<input checked="" type="checkbox"/> PTC	Administrator XO	- \$3,300.00 <i>(per itemization attached as Exhibit B, for 11.0 hours @ \$300/hour for court-confirmed sale of real property)</i>	
<input checked="" type="checkbox"/> Not.Cred.	Petitioner requests she be authorized to remit the balance on hand in the estate, after payment of costs of administration, to the Department of Health Care Services, based upon the following:		
<input checked="" type="checkbox"/> Notice of Hrg	<ul style="list-style-type: none"> • <i>Creditor's Claim</i> for \$67,369.94 was filed 5/17/2011 by the Department of Health Care Services; • Prior to filing of the <i>Petition for Probate</i>, the Administrator attempted to surrender the Decedent's real property directly to the Department of Health Care Services; • However, the Department requested that a probate proceeding be commenced; • The assets of the estate are not sufficient to pay the claim in full. 		
<input checked="" type="checkbox"/> Aff.Mail	W/		
<input type="checkbox"/> Aff.Pub.			
<input checked="" type="checkbox"/> Sp.Ntc.	W/		
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters	071411		
<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 type="checkbox"/> Order	X		
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input checked="" type="checkbox"/> FTB Notice		Distribution is to the Department of Health Care Services in partial satisfaction of the Creditor's Claim – \$39,943.87 cash.	
			Reviewed by: LEG
			Reviewed on: 4/2/13
			Updates:
			Recommendation:
			File 10 - Graham

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 7 years DOB: 9/4/2005		<u>TEMPORARY EXPIRES 4/9/2013</u>		NEEDS/PROBLEMS/COMMENTS:	
		HERMINIA PACHECO, paternal grandmother, is petitioner.		<ol style="list-style-type: none"> 1. Need proof of personal service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice on: <ol style="list-style-type: none"> a. Tonika Gonzalez (mother) – unless the court dispenses with notice. 2. 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"> a. Maternal grandparents 	
		Father: ADAM V. PACHECO, Sr. – personally served on 2/13/13.			
		Mother: TOKINA GONZALEZ – Declaration of Due Diligence filed on 2/13/13.			
		Paternal grandfather: Ramon Ortiz Pacheco – Deceased.			
		Maternal grandfather: Unknown			
		Maternal grandmother: Unknown			
Cont. from					
	Aff.Sub.Wit.				
✓	Verified				
	Inventory				
	PTC				
	Not.Cred.				
✓	Notice of Hrg				
	Aff.Mail		X		
	Aff.Pub.				
	Sp.Ntc.				
✓	Pers.Serv.		W/		
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
✓	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
		<p>Petitioner states the father is currently in jail. Father left the child in the care of his girlfriend who is abusing drugs and alcohol.</p> <p>Objections of Michelle Maldonado, step-mother, filed on 2/15/13. Objector states she believes that the grandmother is not capable of caring for the child. Objector states Herminia has epilepsy. She is also concerned that Ramon Pacheco is also living in the home. Objector states Ramon has threatened her life and is verbally abusive. Objector believes the only reason Herminia wants to have the minor is to receive money for her. Objector states she wants the minor to be in a home where she is taken care of properly and where she is the number one priority.</p> <p>Court Investigator Jennifer Daniel's Report filed on 4/2/13</p>			
				Reviewed by: KT	
				Reviewed on: 4/3/13	
				Updates:	
				Recommendation:	
				File 11 - Pacheco	

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 10 years		<u>TEMPORARY EXPIRES 4/9/13</u>		<p>NEEDS/PROBLEMS/ COMMENTS:</p> <ol style="list-style-type: none"> 1. 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 for: <ol style="list-style-type: none"> a. Jamal Easter (father) 2. 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 for: <ol style="list-style-type: none"> a. Paternal grandmother b. Maternal grandfather
		ALEXANDRA FIGUEROA , step-mother, is petitioner.		
		Father: JAMAL EASTER		
Cont. from		Mother: TRICIA STILES – personally served on 2/19/13.		
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail		X	
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W/		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
<p>Paternal grandfather: Deceased. Paternal grandmother: unknown Maternal grandfather: unknown Maternal grandmother: Bernice Stiles – personally served on 3/11/13.</p> <p>Petitioner states the father has never been involved and chooses not to be. The mother is a drug abuser and is in no condition to physically or mentally care for the child. Petitioner states she has helped care for and been in the child’s life since he was 3 months old.</p> <p>Court Investigator Samantha Henson’s Report filed on 3/29/13.</p>				
Reviewed by: KT				
Reviewed on: 4/3/12				
Updates:				
Recommendation:				
File 12 – Davis-Easter				

Pro Per Gaitan, Vera Rodriguez (Pro Per Petitioner, maternal grandmother)

Petition for Appointment of Temporary Guardian of the Person
(Prob. C. 2250)

Nevada Age: 7 yrs		<p style="text-align: center;"><u>General Hearing set for 5/28/2013</u></p> <p>VERA RODRIQUEZ GAITAN, maternal grandmother, is Petitioner.</p> <p>Father of Nevada: ISMAEL VELASCO Father of Electra: BRIAN S. ACEVEDO</p> <p>Mother: NEVADA TARA RODRIQUEZ; consents and waives notice.</p> <p>Paternal grandparents of Nevada: Unknown. Paternal grandparents of Electra: <i>Not provided.</i></p> <p>Maternal grandfather: Richard P. Rodriguez</p> <p>Petitioner states the children have been living with her since 2008, and the mother comes and goes from the children's life. Petitioner states the mother has a drug problem and has been homeless on and off for the past 10 years. Petitioner states it is in the best interest of the children that they be protected from the mother due to her abuse of drugs and being homeless living out on the street.</p> <p>Petitioner requests to be excused from giving notice to the father of Nevada (Ismael Velasco) as he was deported in 2008 to Mexico and she has no information about him; and to the father of Electra (Brian Acevedo) because he was just released from Soledad State Prison and his whereabouts are unknown.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> If Court does not excuse notice as Petitioner requests, need <i>Notice of Hearing</i> and proof of five (5) court days' notice by personal service of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian</i>, or <i>Consent to Appointment of Guardian and Waiver of Notice</i>, or a <i>Declaration of Due Diligence</i>, for: <ul style="list-style-type: none"> Ismael Velasco, father of Nevada; Brian S. Acevedo, father of Electra. Need <i>Guardianship Petition – Child Information Attachment</i> (form GC-210) for Electra Acevedo. Item 6 of <i>Confidential Guardian Screening</i> form filed on 3/25/2013 is incomplete re: social worker or parole or probation officer.
Electra Age: 6 yrs			
Cont. from			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg	X		
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.	X		
✓ Conf. Screen			
Aff. Posting			
✓ Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
✓ Letters			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: LEG</p> <p>Reviewed on: 4/3/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13 – Rodriguez & Acevedo</p>	

Petition for Appointment of Temporary Guardian of the Person (Prob. C. 2250)

Age: 4 months	TEMPORARY EXPIRES 4/9/13	NEEDS/PROBLEMS/COMMENTS:
	GENERAL HEARING 5/29/13	
Cont. from	LAVONNE REA WIGGIN , maternal grandmother, is petitioner.	<ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service of the Notice of Hearing along with a copy of the temporary petition or Consent and Waiver of Notice or Declaration of Due Diligence for: <ol style="list-style-type: none"> a. Michael James Fields, Jr. (father) b. Nicole Lee Wiggins (mother)
<input type="checkbox"/> Aff.Sub.Wit.	Father: MICHAEL JAMES FIELDS, JR.	
<input checked="" type="checkbox"/> Verified	Mother: NICOLE LEE WIGGIN	
<input type="checkbox"/> Inventory	Paternal grandfather: Michael James Fields	
<input type="checkbox"/> PTC	Paternal grandmother: Christina Marberry	
<input type="checkbox"/> Not.Cred.	Maternal grandfather: Frederick Carl Wiggin	
<input type="checkbox"/> Notice of Hrg	Petitioner states the parents are both juveniles. They are both frequently engaged in domestic fights. The police have been out several times. Petitioner states she has been caring for the minor since his birth. Mom is now threatening to run off and live with the father. CPS has removed the younger brother and sister of the father because the home is unfit for small children to be in. Father also has a drug and alcohol problem.	
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input checked="" type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input checked="" 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 checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 4/3/13
		Updates:
		Recommendation:
		File 14 - Fields