

**(1) First and Final Account and Report of Administrator of Insolvent Estate and (2) Petition for Allowance of Ordinary Fees**

<b>DOD: 3/14/2008</b>	<b>PUBLIC ADMINISTRATOR</b> , Administrator, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Account period: <b>7/9/08 – 11/22/13</b>	<u>Continued from 03/27/14</u>
<b>Cont. from 032714</b>	Accounting - <b>\$122,095.99</b>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Beginning POH - <b>\$120,000.00</b>	
<input checked="" type="checkbox"/> <b>Verified</b>	Ending POH - <b>\$ 1,714.65</b>	
<input checked="" type="checkbox"/> <b>Inventory</b>	Administrator (statutory) - <b>\$83.84</b>	
<input checked="" type="checkbox"/> <b>PTC</b>	Attorney (statutory) - <b>\$83.84</b>	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	Bond fee (o.k.) - <b>\$1,526.20</b>	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Court fees (certified copies) - <b>\$46.50</b>	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> w/	<b>Petitioner states</b> the real property and only asset of the estate was lost to foreclosure.	
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>	<b>Petitioner prays for an order that:</b>	
<input type="checkbox"/> <b>Pers.Serv.</b>	1. The final account be settled, allowed and approved, and all acts and proceedings of petitioner as administrator be confirmed and approved;	
<input type="checkbox"/> <b>Conf. Screen</b>	2. Petitioner and his attorney each be authorized the sum of \$83.84 as their statutory compensation;	
<input checked="" type="checkbox"/> <b>Letters</b> 7/9/08	3. Petitioner be authorized to pay from the estate a bond fee of \$1,526.20 and court fees of \$46.50.	
<input type="checkbox"/> <b>Duties/Supp</b>		<b>Reviewed by:</b> KT/JF
<input type="checkbox"/> <b>Objections</b>		<b>Reviewed on:</b> 04/07/14
<input type="checkbox"/> <b>Video Receipt</b>		<b>Updates:</b>
<input type="checkbox"/> <b>CI Report</b>		<b>Recommendation:</b>
<input checked="" type="checkbox"/> <b>9202</b>		<b>File 1 - Houser</b>
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>		

**2 Juana Alcorta (Estate)**

**Case No. 10CEPR00975**

**Atty Kruthers, Heather H. (for Public Administrator – Successor Administrator/Petitioner)**

**(1) First and Final Account and Report of Successor Administrator and (2) Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and (3) for Distribution**

<b>DOD: 06/30/05</b>	<b>PUBLIC ADMINISTRATOR</b> , successor Administrator, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b> <u>Continued from 03/27/14</u></p> <p>1. The DHS filed a creditor's claim in the amount of \$46,263.36 on 01/10/11. The Petition states that the DHS has reduced its claim to \$34,697.52, however no documentation has been filed by the DHS reducing their claim. Further, no acceptance/rejection of the claim has been filed and no proof of satisfaction of the claim has been filed by the creditor. Need proof of satisfaction or withdrawal of claim before the property can be distributed.</p>
	Account period: <b>02/01/13 – 11/20/13</b>	
<b>Cont. from 032714</b>	Accounting - <b>\$246,008.96</b>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Beginning POH - <b>\$245,000.00</b>	
<input checked="" type="checkbox"/> <b>Verified</b>	Ending POH - <b>\$245,000.00</b>	
<input checked="" type="checkbox"/> <b>Inventory</b>	Administrator - <b>\$7,000.00</b> (statutory)	
<input checked="" type="checkbox"/> <b>PTC</b>	Attorney - <b>\$7,000.00</b> (split evenly (\$3,500.00 each) between County Counsel and Gary L. Motsenbocker (attorney for former administrator))	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	Costs - <b>\$410.50</b> (certified copies, probate referee)	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Reserve - <b>\$500.00</b>	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> w/	Petitioner states that the sole asset of the estate is real property valued at \$245,000.00. In order to allow Patricio Alcorta, son of the decedent, to remain in the house, the family has agreed to pay all fees and creditor's claims against the estate totaling \$49,608.02.	
<b>Aff.Pub.</b>	The heirs have agreed that the property will be distributed in undivided interests to Eliseo Urbano, Jr. and Shelley Urbano. The other heirs have assigned their interests in the property to Eliseo and Shelley.	
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b> 01/06/11		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<input checked="" type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 04/07/14
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 2 - Alcorta</b>

**Statement of Public Administrator's Disposition of Property; and Request for Discharge**

<b>DOD: 6-27-12</b>	<b>PUBLIC ADMINISTRATOR</b> , Administrator under Probate Code §7660, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Account period: 8-22-12 through 1-15-14	<b>1. Need filing fees of \$495.00 for the following items:</b>
	Accounting: \$98,633.62	- Petition for Ex Parte Order Approving Extraordinary Commissions for the Public Administrator filed 5-16-13 (\$60.00)
<b>Aff.Sub.Wit.</b>	Beginning POH: \$91,448.12	- Petition of Administrator for Admission of Holographic Will to Probate and for Confirmation of Childrne as Beneficiaries filed 8-9-13 and heard on 9-18-13 and 10-2-13 (\$435.00).
<b>Verified</b>	Ending POH: \$ 0.00	<b>Note:</b> As previously discussed, the §7660 reduced filing fee of \$205.00 covers the initial petition and this final petition; however, the additional matters heard during administration require filing fees.
<b>Inventory</b>	Administrator (Statutory): \$3,945.35	
<b>PTC</b>	Administrator (Extraordinary): \$1,248.00 (for sale of personal property and tax preparation pursuant to Order dated 5-23-13)	
<b>Not.Cred.</b>	Attorney (Statutory): \$3,945.35	
<b>Notice of Hrg</b>	Bond fee: \$246.59 (ok)	
<b>Aff.Mail</b>	Petitioner states that although the decedent's will dated 9-21-90 was originally admitted to probate, a holographic will was found dated 9-21-90 which devised the estate to the decedent's wife. A petition was filed and the matter was heard on 10-2-13. Pursuant to the Court's order dated 10-2-13 the 1990 will was admitted to probate; however, because the decedent and his wife later divorced, distribution would proceed via intestacy. Therefore, the decedent's three children were adjudged to be the heirs to the estate.	
<b>Aff.Pub.</b>	Distribution was therefore made pursuant to Probate Code §7663 as follows:	<b>Reviewed by:</b> skc
<b>Sp.Ntc.</b>	Jack Jackson aka John Broome II: \$12,846.35	<b>Reviewed on:</b> 4-7-14
<b>Pers.Serv.</b>	Derek Jackson aka Derek Broome: \$14,346.34	<b>Updates:</b>
<b>Conf. Screen</b>	Stephanie Jackson aka Stephanie Broome: \$14,346.34	<b>Recommendation:</b>
<b>Letters</b>	Petitioner states all fees and commissions and expenses have been paid, and the residue was paid to the heirs. All property has now been liquidated and disbursed and the Public Administrator requests that this estate be settled and closed and that the Public Administrator be discharged.	<b>File 3 – Broome</b>
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

**4 Betty Mitsuko Maekawa (Estate)**

**Case No. 13CEPR00663**

**Atty Salazar, Steven F. (for Carilyn Maekawa – Executor/Petitioner)**

**(1) Petition for Settlement of First and Final Report on Waiver of Account and (2) for Final Distribution and (3) Allowance of Statutory Attorney's Fees and (4) Reimbursement of Costs of Administration**

<b>DOD: 05/28/13</b>	<b>CARILYN MAEKAWA</b> , Executor, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>Neither the Petition nor the Order specify the dollar amount to be distributed. Need revised Order pursuant to Local Rule 7.6.1A.</li> <li>The petition proposes to distribute the estate to a pre-existing trust, therefore need declaration pursuant to Local Rule 7.12.5.</li> </ol>
<b>Cont. from</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	I & A - <b>\$252,201.53</b>	
<input checked="" type="checkbox"/> <b>Verified</b>	POH - <b>\$285,107.02</b>	
<input checked="" type="checkbox"/> <b>Inventory</b>	Executor - <b>waived</b>	
<input checked="" type="checkbox"/> <b>PTC</b>	Attorney (statutory) - <b>\$9,017.19</b>	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b> w/	Costs - <b>\$1,518.42</b> (filing fees, publication, probate referee)	
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>	Closing - <b>\$2,000.00</b>	
<input type="checkbox"/> <b>Conf. Screen</b>	<b>Distribution, pursuant to decedent's will, is to:</b>	
<input type="checkbox"/> <b>Letters</b> 09/04/13	Carilyn S. Maekawa, Trustee of THE MAEKAWA FAMILY TRUST – 100%	
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input checked="" type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 04/07/14
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 4 – Maekawa</b>

Helen DOD: 01/15/07		<p><b>GREGORY S. SNIDER</b>, successor trustee, is Petitioner.</p> <p><b>Petitioner states:</b></p> <ol style="list-style-type: none"> <li>STUART R. SNIDER (the "Decedent") and HELEN R. SNIDER, husband and wife, as settlors and trustees, established the <b>STUART AND HELEN SNIDER LIVING TRUST</b> by declaration of trust dated 09/13/01 (the "Trust").</li> <li>Helen Snider died on 01/15/07.</li> <li>Upon Helens death, the Trust remained a single trust and remained revocable by the Decedent as the surviving settlor. Decedent became the sole trustee of the Trust upon Helen's death.</li> <li>On 04/20/12, the Decedent amended the Trust by a First Amendment to the Trust. On 04/21/12, Decedent resigned as trustee of the Trust and Petitioner, Greg Snider, the son of Decedent, became the sole successor trustee.</li> <li>On 05/30/12, the Decedent executed a document entitled "Last Will and Testament of Stuart Snider" and also on 04/08/13, Decedent executed a document entitled "Last Will and Testament of Stuart Snider".</li> <li>Decedent died on 06/16/13 and upon his death, the Trust became irrevocable. Petitioner continues to serve as the sole successor trustee of the Trust.</li> <li>The Trust and First Amendment were prepared by Decedent's attorneys. After executing the First Amendment, Decedent indicated to Petitioner that he wanted to make additional changes to the Trust, but did not want to incur additional legal expenses to do so.</li> <li>Due to Decedent's advanced Parkinsons disease, the Decedent was unable to write or type the Second Amendment and instead, he dictated the contents to his caregiver who then typed it and Decedent signed it.</li> </ol> <p style="text-align: center;">Continued on Page 2</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>CONTINUED FROM 03/12/14</b>  <b>Minute Order from 03/12/14 states:</b>  <b>The Court notes that Mr. Snider is being represented solely as the successor trustee and is not advocating for any position. Amended Petition to be filed. Notice to be given to all parties. The Court will expect any objections to be provided to the Court in accordance with the appropriate rules of court and code sections.</b></p> <p><b>As of 04/07/14, nothing further has been filed in this matter.</b></p> <p><b>Note:</b> Amanda Bonk, decedent's granddaughter was appointed as Guardian Ad Litem for minor beneficiaries of the Trust – Paige Fowler, Hailey Bonk &amp; Brooklyn Bonk. It is unclear whether the Guardian Ad Litem or her attorney (Melissa Webb) will be filing any opinion regarding the Petition on behalf of the minor beneficiaries.</p> <ol style="list-style-type: none"> <li>Notice of hearing to Michael Bonk, Hailey Bonk, Heather DeVoto and Brooklyn Bonk was sent in care of Roger Bonk, notice of hearing to Paige Fowler was sent in care of Amanda Bonk, and notice of hearing to Jeanette Frye was sent in care of Dennis Frye; notice mailed to a person in care of another is insufficient, pursuant to California Rules of Court 7.51 (a)(2).</li> </ol>
Stuart DOD: 06/16/13			
Cont. from 031214			
<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		
<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><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 04/07/14</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 5 – Snider</b></p>	

9. The Second Amendment was delivered to Petitioner as trustee of the Trust.
10. A third Amendment was also dictated by the Decedent to his caregiver who typed it and Decedent signed it. The Third Amendment was also delivered to Petitioner as Trustee of the Trust.
11. The dispositive provisions of the Trust are set forth in Section 6.3 of the Trust. The First Amendment to the Trust revised these dispositive provisions in their entirety so that upon the death of Decedent, the Trust estate was to be distributed as follows:
  - a. Tangible personal property was to be distributed by memorandum or designated then the remainder was to be distributed to the Decedent's children: Gregory Snider and Sheryl Hastay (also known as Sheryl Kilgallen).
  - b. The sum of twenty five thousand dollars (\$25,000.00) was to be distributed to each of Decedent's children: Gregory Snider and Sheryl Hastay.
  - c. The sum of twelve thousand dollars (\$12,000.00) was to be distributed to each of the Decedent's grandchildren: Amanda Bonk, Michael Bonk, and Emily Hastay.
  - d. The sum of seven thousand dollars (\$7,000.00) was to be distributed to each of the Decedent's then living great-grandchildren: Paige Fowler and Hailey Bonk.
  - e. The sum of ten thousand dollars (\$10,000.00) was to be distributed to the Decedent's brother, David Snider.
  - f. The sum of five thousand dollars (\$5,000.00) was to be distributed to each of Martha Martinez Villegas and Jennifer Gutierrez, former employees of the Decedent;
  - g. The remaining trust estate was to be distributed in equal shares to the Decedent's children: Gregory Snider and Sheryl Hastay.
12. The Second Amendment revised the dispositive provisions in their entirety and specifically states as follows: "[e]verything else goes in a trust. I wish to give Greg, Sherry, Amanda, Emily, David and Jeanette \$10,000.00 each from the trust. The remaining amount in the trust is to be divided equally among Greg, Amy, Sherry, Amanda, Emily, Paige, Hilary, Michael and Heather." Petitioner alleges that the reference to Hilary is a typo and actually refers to Hailey Bonk. Greg and Sherry are the Decedent's children. Amanda, Emily and Michael are the Decedent's grandchildren. David is the Decedent's brother. Jeanette is the Decedent's girlfriend. Amy is the Decedent's daughter-in-law. Paige and Hailey are the then living great grandchildren of the Decedent. Heather is the partner of Decedent's grandson Michael.
13. The Third Amendment again revised the dispositive provisions in their entirety and specifically states as follows: "[t]rust funds are to be divided equally among: Greg, Sherry, Michael, Emily, Paige, Hilary, Jeanette, David, Amy, Heather and Michael and Heather's unborn child. Amanda will get my personal property that she stored for me including the wheelchairs." Michael and Heather's child, Brooklyn, was born after the Third Amendment was signed.
14. Petitioner believes that Decedent intended that the Second and Third Amendments to be amendments to the Trust.
15. The relevant portion of Article Three, Section 3.2 of the Trust provides as follows: "[a]fter the death of the deceased settlor, the surviving settlor may at any time amend, revoke, or terminate, in whole or in part, any trust created by this amendment other than the Disclaimer Trust, which shall be irrevocable and not subject to amendment."
16. The relevant portion of Article Three, Section 3.3 of the Trust provides as follows: "[a]ny amendments, revocation, or termination of any trust created by this instrument shall be made by written instrument signed by both settlors or by the settlor making the revocation, amendment, or termination, and delivered to the trustee."

Continued on Page 3

17. Based on Probate Code §§ 15401(a)(1) and 15402, Petitioner believes that the Second and Third Amendments were validly executed amendments to the Trust under the terms of the Trust and California law and that the Trust estate should be distributed pursuant to the provisions of the Third Amendment.
18. Petitioner states that the titles of the Second Amendment and the Third Amendment, "Last Will and Testament of Stuart Snider" and "Last Will and Testament of Stuart Snider Revised," respectively, were simple scrivener's mistakes. The caregiver did not have a legal background and was not aware that the documents should have been titled as trust amendments rather than wills.
19. Under Probate Code § 17200(a), the Court has the jurisdiction to determine the validity of a trust amendment. Accordingly, Petitioner requests that the Court confirm and declare that the Third Amendment is a valid amendment to the Trust and that the Trust estate should be distributed in accordance with the terms of the Third Amendment.

**Petitioner prays for an Order:**

1. Confirming and declaring that the Third Amendment is a valid amendment to the Trust; and
2. Instructing Greg Snider, as trustee of the Trust, to distribute the remaining assets of the Trust in accordance with the terms of the Third Amendment.

		<p><b>KEVIN S. CAMPBELL</b>, beneficiary, is Petitioner.</p> <p>Petitioner states he is an income and principal beneficiary of <b>The Jerry W. Campbell and Billie J. Campbell Irrevocable Trust dated March 28, 1991</b>. The trust is irrevocable.</p> <p>Petitioner states <b>DAVID E. ASH</b> is the duly appointed and acting trustee. Petitioner states the trustee has not made any report of information whatsoever concerning the trust for the period starting with commencement of the trust on 3-28-91 until 8-3-00. For the period 8-3-00 until 2-1-09, the trustee provided incomplete and handwritten information (see attached copies). All of this incomplete and handwritten information is written so sloppily that it is difficult or impossible to comprehend. Moreover, because no information has been provided concerning the trust from 3-28-91 through 8-3-00, there is no context for understanding what little incomplete information has been provided.</p> <p>Petitioner states that on or about 7-1-13 Petitioner delivered by facsimile a written request for information pursuant to Probate Code §§ 16062 and 16063. To date, the trustee has failed and refused to prepare and provide Petitioner with the requested account.</p> <p><b>Petitioner prays for an order:</b></p> <p>1) <b>Compelling David E. Ash as trustee to prepare and file with this Court an account of the trust since its commencement on 3-28-91, including copies of any and all documents that support, substantiate, or evidence any item set forth in the accounting;</b></p> <p>2) <b>Instructing David E. Ash to petition this Court for the settlement of the account and give notice of the hearing on the petition;</b></p> <p>3) <b>For such attorney fees and costs as may be allowable by law; and</b></p> <p>4) <b>For all other orders the Court deems proper.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Probate Code §17201 requires the petition to list <u>all persons entitled to notice</u>. Petitioner lists the other <u>living beneficiaries</u>; however, need clarification: Does this list include <u>all persons entitled to notice</u> pursuant to §17203?</p> <p>For example, it appears that according to the terms of the trust, spouses and issue of beneficiaries may also be entitled to notice. Some of the beneficiaries are deceased. Is anyone else entitled to notice?</p> <p>2. Need dates of death per Local Rule 7.1.1.D. for:</p> <ul style="list-style-type: none"> <li>- Jerry W. Campbell (trustor)</li> <li>- Billie J. Campbell (trustor)</li> <li>- Randall Campbell (deceased beneficiary)</li> <li>- Ricky Campbell (deceased beneficiary)</li> <li>- Jennifer Campbell (deceased beneficiary)</li> </ul> <p>3. The attached copy of the trust is blank at various pertinent sections, such as the amount initially transferred, the appointment of a trustee, the amount initially received by the trustee, and Schedule A. Need clarification: Is a complete copy of the trust available?</p> <p>4. According to the terms of the trust, the trust was to be split into six <u>separate</u> trusts for each beneficiary upon the deaths of the trustors. However, Petitioner appears to be requesting accounting for the original trust since its inception through the present.</p> <p>The Court may require clarification regarding the requested account period and for which trusts.</p> <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p> <p>Reviewed by: skc</p> <p>Reviewed on: 4-7-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 6 – Campbell</p>
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	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		

NEEDS/PROBLEMS/COMMENTS (Continued):

5. Probate Code §17000(b)(7)(B) allows petition under this section if the trustee has failed to provide the requested information within 60 days after the beneficiary's reasonable written request.

Petitioner states he faxed a request to the trustee on or about July 1, 2013, and to date the trustee has failed and refused to prepare and provide the requested account.

However, the copy of the letter at Exhibit C does not indicate any fax number or designation (i.e., "sent via facsimile") or fax confirmation data on the page, and Petitioner also does not indicate whether the communication was followed up via regular or certified mail, or telephone call, or whether he was able to confirm receipt of the fax.

Further, the copies of the ledger information provided by the trustee appear to be dated as late as November 2013, which is after the date of the request. This indicates that the copies may have been provided in response to the request.

If so, need clarification as to whether reasonable written request was made after receipt of the ledgers in response to the letters, providing time for response pursuant to Probate Code §17000(b)(7)(B).

6. The copy of the letter at Exhibit C is addressed to David Ash at an address on Locust Avenue; however, Notice of Hearing for this matter was sent to an address on Herndon Avenue. The Court may require clarification or continuance for proper notice.
7. The proposed order includes his filing costs and attorney fees in the amount of \$1,500.00. The Court may require an itemized declaration regarding the fees from the attorney.

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

<b>DOD: 11/13/2013</b>		<p><b>JOHN MCMURRAY</b>, named executor without bond, is petitioner.</p> <p>Full IAEA – o.k.</p> <p>Will dated: 12/11/2001</p> <p>Residence: Fresno          Publication: The Business Journal</p> <p><b>Estimated value of the Estate:</b></p> <table border="0"> <tr> <td>Personal property</td> <td>-</td> <td>\$50,000.00</td> </tr> <tr> <td>Real property</td> <td>-</td> <td>\$30,000.00</td> </tr> <tr> <td><b>Total</b></td> <td>-</td> <td><b>\$80,000.00</b></td> </tr> </table> <p>Probate Referee: Rick Smith</p>	Personal property	-	\$50,000.00	Real property	-	\$30,000.00	<b>Total</b>	-	<b>\$80,000.00</b>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need date of death of the deceased spouse pursuant to Local Rule 7.1.D.</li> <li>2. #8 of the petition does not provide the relationship of the petitioner to the decedent as required.</li> <li>3. Need Notice of Petition to Administer Estate.</li> <li>4. Need proof of service of Notice of Petition to Administer Estate on the following:             <ul style="list-style-type: none"> <li>• John McMurray</li> <li>• Mark McMurray</li> <li>• David McMurray</li> </ul> </li> <li>5. Need Order.</li> </ol> <p><b>Note: If the petition is granted status hearings will be set as follows:</b></p> <ul style="list-style-type: none"> <li>• <b>Friday, 09/12/2014 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <u>and</u></li> <li>• <b>Friday, 06/19/2015 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
Personal property	-		\$50,000.00									
Real property	-		\$30,000.00									
<b>Total</b>	-		<b>\$80,000.00</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> x											
<input type="checkbox"/>	<b>Aff.Mail</b> x											
<input checked="" 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 type="checkbox"/>	<b>Order</b> x											
<input type="checkbox"/>	<b>Aff. Posting</b>											
<input type="checkbox"/>	<b>Status Rpt</b>											
<input type="checkbox"/>	<b>UCCJEA</b>											
<input type="checkbox"/>	<b>Citation</b>											
<input type="checkbox"/>	<b>FTB Notice</b>											
		<b>Reviewed by:</b> LV										
		<b>Reviewed on:</b> 04/07/2014										
		<b>Updates:</b>										
		<b>Recommendation:</b>										
		<b>File 7 – Holford</b>										

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

<b>DOD: 01/08/2014</b>		<b>MART B OLLER, IV</b> , son/named executor without bond, is petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><u>Continued to 05/19/2014 at the Petitioner's request.</u></b></p> <ol style="list-style-type: none"> <li>1. Need date of death of the deceased spouse pursuant to Local Rule 7.1.1D.</li> <li>2. Need Affidavit of Publication.</li> <li>3. Need Confidential Supplement to Duties &amp; Liabilities of Personal Representative.</li> </ol> <p><b>Note: If the petition is granted status hearings will be set as follows:</b></p> <ul style="list-style-type: none"> <li>• <b>Friday, 09/12/2014 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <b>and</b></li> <li>• <b>Friday, 06/19/2015 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
		Full IAEA – ?	
<b>Cont. from</b>		Will dated: 05/11/1978	
<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 checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>	x	
<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>		

<b>DOD: 01/14/2014</b>	<b>DEANNA BALVER</b> , surviving spouse, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
	No other proceedings		
	Decedent died intestate		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	<p>Petitioner states that she and the decedent were married on 05/14/1994, in Kings County, California, and were married over 19 years. During their marriage, they purchased the real property commonly known as 3050 Joy Street, Selma California, with community property funds. At the time of the decedent's death, title to the real property was held in Decedent's name alone. Decedent has no children and died intestate. Under Probate Code §6401 (a), Decedent's entire estate passes to his surviving spouse.</p> <p>Petitioner requests court confirmation that an undivided one half of the property located at 3050 Joy Street, Selma, Ca be passed to her and that the remaining one half is confirmed as belonging to Deanna Balver.</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 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 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: LV</b>	
		<b>Reviewed on: 04/07/2014</b>	
		<b>Updates:</b>	
		<b>Recommendation: SUBMITTED</b>	
		<b>File 9 – Balver</b>	

Amended Waiver of Accounting and Petition for Final Distribution under Will

DOD: 4-19-07		<p><b>EVELYN S. DUARTE</b>, Executor with Full IAEA without bond, is Petitioner.</p> <p>Accounting is waived by heirs</p> <p>I&amp;A: \$155,000.00 (real property)</p> <p>POH: Not stated; however, it appears the real property has not been sold.</p> <p>Executor (Statutory): Waived</p> <p>Former Attorney (Statutory): Waived per declaration filed 11-25-13</p> <p>Closing: \$500.00 (?)</p> <p>Petitioner states there are creditor's claims outstanding and unpaid property taxes.</p> <p><b>Petitioner requests distribution</b> of the estate's real property pursuant to Decedent's will to Evelyn S. Duarte, Lila Holguin, and Melissa Romero (shares not specified)</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Continued from 2-26-14</u></p> <p><b>Minute Order 2-26-14:</b> The Court notes that all heirs are present and have waived accounting. The Court is satisfied that the property taxes have been paid through the escrow account of the lender as indicating in Exhibit "F" in the Court's file. Matter continued to 4-9-14.</p> <p><b>Note:</b> A declaration filed 4-3-14 appears to cure most of the previously noted issues. The following issues remain noted:</p> <ol style="list-style-type: none"> <li><b>Petitioner requests to withhold \$500 for closing; however, there does not appear to be cash in the estate. Need clarification.</b></li> <li><b>Need order.</b></li> </ol>	
Cont. from 022614				
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
✓	PTC			
✓	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters	7-10-07		
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
✓	9202			
	Order	X		
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
N/A	FTB Notice			
		<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 4-7-14</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 10 – Flores</b></p>		

Petition for Termination of Guardianship

<b>Age: 6</b>		<p><b>GLORIA GLADLEY</b>, mother, and <b>MYRON ELLSBERRY, JR.</b>, father, are petitioners.</p> <p><b>MYRON ELLSBERRY</b> and <b>KELLEY ELLSBERRY</b>, paternal grandparents, were appointed guardians on 08/22/2013.</p> <p>Maternal Grandfather: Delwyn Gassway          Maternal Grandmother: Gloria Radford</p> <p><b>Petitioners do not provide a reason why termination of the guardianship is in the best interest of the minors.</b></p> <p><b>Court Investigator JoAnn Morris' report filed 04/02/2014.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>Petition is incomplete. Petitioners do not provide a reason why termination of the guardianship is in the best interest of the minors.</li> <li>Need Notice of Hearing.</li> <li>Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Termination of Guardianship or consent and waiver of notice or declaration of due diligence for:             <ul style="list-style-type: none"> <li>Myron Ellsberry (Paternal Grandfather/Guardian)</li> <li>Kelley Ellsberry (Paternal Grandmother/Guardian)</li> <li>Delwyn Gassway (Maternal Grandfather)</li> <li>Gloria Radford (Maternal Grandmother)</li> </ul> </li> </ol>	
<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 type="checkbox"/>	<b>Notice of Hrg</b>			<input checked="" type="checkbox"/>
<input type="checkbox"/>	<b>Aff.Mail</b>			<input checked="" type="checkbox"/>
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input 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:</b> LV		
		<b>Reviewed on:</b> 04/08/2014		
		<b>Updates:</b>		
		<b>Recommendation:</b>		
		<b>File 11 – Ellsberry</b>		

12 **Raelyn Eva Valladores (GUARD/P)**  
 Atty **Ortez, Angelina (Pro Per – Petitioner – Maternal Aunt)**  
 Atty **Ortez, Rinaldo Ray (Pro Per – Petitioner – Maternal Uncle)**

Case No. 14CEPR00099

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

<b>Age: 2 months</b>		<b><u>TEMPORARY EXPIRES 04/09/2014</u></b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>ANGELINA ORTEZ and RINALDO ORTEZ,</b> maternal aunt and uncle are petitioners.		1. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>• Paternal Grandfather (Unknown)</li> <li>• Paternal Grandmother (Unknown)</li> </ul>	
<b>Cont. from</b>		Father: <b>CHRIS GUTIEREZ</b> , personally served on 03/25/2014			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>				
<input checked="" type="checkbox"/>	<b>Verified</b>	Mother: <b>CYNTHIA E. VALLADORES</b> , consents and waives notice			
<input type="checkbox"/>	<b>Inventory</b>	Paternal Grandfather: Unknown Paternal Grandmother: Unknown			
<input type="checkbox"/>	<b>PTC</b>				
<input type="checkbox"/>	<b>Not.Cred.</b>				
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Maternal Grandfather: Alfredo A. Valladores, Deceased Maternal Grandmother: Norma Linda Garcia, Deceased			
<input type="checkbox"/>	<b>Aff.Mail</b>	<input checked="" type="checkbox"/>			
<input type="checkbox"/>	<b>Aff.Pub.</b>				
<input type="checkbox"/>	<b>Sp.Ntc.</b>				
<input checked="" type="checkbox"/>	<b>Pers.Serv.</b>	<b>Petitioners state:</b> the mother of the minor child does not want the child. She is unstable and at the present time is unable to care for the child. She tested positive for drugs. Guardianship is needed so the proposed guardians will be able to obtain medical care for the child, when necessary. The baby is only a few days old and will need to be taken to the doctor for checkups, etc. The guardianship will also provide the proposed guardians the opportunity to place the child on their health insurance. Without guardianship the baby would be placed in Foster Care. Petitioners do plan to adopt in the future.			
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>				
<input checked="" type="checkbox"/>	<b>Letters</b>				
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>				
<input type="checkbox"/>	<b>Objections</b>				
<input type="checkbox"/>	<b>Video Receipt</b>				
<input checked="" type="checkbox"/>	<b>CI Report</b>				
<input type="checkbox"/>	<b>9202</b>				
<input checked="" type="checkbox"/>	<b>Order</b>				
<input type="checkbox"/>	<b>Aff. Posting</b>				
<input type="checkbox"/>	<b>Status Rpt</b>				
<input checked="" type="checkbox"/>	<b>UCCJEA</b>				
<input type="checkbox"/>	<b>Citation</b>				
<input type="checkbox"/>	<b>FTB Notice</b>	<b>Court Investigator JoAnn Morris' report filed 03/27/2014.</b>			
				<b>Reviewed by: LV</b>	
				<b>Reviewed on: 04/07/2014</b>	
				<b>Updates:</b>	
				<b>Recommendation:</b>	
				<b>File 12 – Valladores</b>	

<b>DOD: 5/12/2010</b>	<p><b>RICK GONZALEZ</b> was appointed as Administrator without bond and with <b>Limited</b> IAEA authority on 4/22/2013.</p> <p>Letters issued on 4/26/2013.</p> <p>I &amp; A filed on 10/2/2012 show the estate valued at \$130,400.00, consisting of real property (encumbered) and minimal personal property.</p> <p>This status hearing was set for the filing of the first account or petition for final distribution.</p> <p><b>Order Confirming Sale of Real Property was entered on 2/13/14.</b></p> <p><b>Status Report filed on 3/24/14</b> states the real property of the estate sold on 3/18/14. A short continuance is needed to file the First and Final Account and Report.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p style="text-align: center;"><b><u>OFF CALENDAR</u></b></p> <p style="text-align: center;"><b>First &amp; Final Account filed 03/26/14 and set for hearing on 04/24/14</b></p>
<b>Cont. from 071713, 082113, 100913, 121813, 032614</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 04/07/14</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 13 – Borunda</b></p>	

William, 22 mos.		<u>GENERAL HEARING 05/29/14</u>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
Makaya, Age/DOB not stated		<p><b>GRAZIELA SAUCEDA</b>, paternal grandmother to William, is Petitioner.</p> <p>Father (William): <b>WILLIAM SANTOS</b> – currently incarcerated at Wasco State Prison</p> <p>Father (Makaya):</p> <p>Mother: <b>ANNETTE HUSTED</b></p> <p>Paternal grandfather: NOT LISTED</p> <p>Maternal grandparents: NOT LISTED</p> <p><b>Petitioner alleges</b> that the mother does not have a safe home for the children. She stays with drug addicts and is frequently fighting with people around her. Petitioner alleges that the children have witnessed the fighting. William gets scared whenever a voice is raised and does not sleep well.</p>		<ol style="list-style-type: none"> <li>1. Need <i>Notice of Hearing</i>.</li> <li>2. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian</i> <u>or</u> <i>Consent &amp; Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for:                             <ol style="list-style-type: none"> <li>a. William Santos (William's father)</li> <li>b. Makaya's father</li> <li>c. Annette Husted (mother)</li> </ol> </li> </ol>	
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	<input checked="" type="checkbox"/>			
<input type="checkbox"/>	Aff.Mail				
<input type="checkbox"/>	Aff.Pub.				
<input type="checkbox"/>	Sp.Ntc.				
<input type="checkbox"/>	Pers.Serv.	<input checked="" type="checkbox"/>			
<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 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: JF	
				Reviewed on: 04/07/14	
				Updates:	
				Recommendation:	
				File 14 – Santos & Colombero	

**Amended Petition for Appointment of Probate Conservator of the Person and Estate**

		<b>TEMP (PERSON ONLY) EXPIRES 4-9-14</b>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><u>THIS MATTER WILL BE HEARD AT 10:00 AM.</u></b></p> <p><b>Court Investigator advised rights on 3-4-14.</b></p> <p><b>Note: If the petition is granted status hearings will be set as follows:</b></p> <ul style="list-style-type: none"> <li>• <b>Friday, 05/30/2014 at 9:00a.m. in Dept. 303</b> for the filing of the bond <b>and</b></li> <li>• <b>Friday, 09/12/2014 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <b>and</b></li> <li>• <b>Friday, 06/19/2015 at 9:00a.m. in Dept. 303</b> for the filing of the first account.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p> <p><b>Reviewed by: skc</b></p> <p><b>Reviewed on: 4-8-14</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 1 – Snavely</b></p>
		<b>BRYAN SNAVELY and BRAD SNAVELY, sons, are</b> Petitioners, and request appointment as Co-Conservators of the Person and Estate with bond set at \$712,848.00.	
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>	<b>Declaration of Don H. Gaede, M.D. filed 03/03/2014.</b>	
	<b>Inventory</b>	<b><u>Voting rights NOT affected.</u></b>	
	<b>PTC</b>	<b><u>Estimated value of the Estate:</u></b>	
	<b>Not.Cred.</b>	Personal property - \$550,000.00	
✓	<b>Notice of Hrg</b>	Annual income - \$95,400.00	
✓	<b>Aff.Mail</b>	Real property - \$1,500,000.00	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>	<b>Petitioners state</b> they have been informed by the proposed conservatee's primary care physician that the proposed conservatee suffers from dementia. His house smells of rodent feces and urine. Food in the refrigerator and freezer is beyond expiration dates. He stores tools with sharp edges and blades in the house. The proposed conservatee cannot care for himself, prepare meals and maintain his residence in a clean and safe condition.	
✓	<b>Pers.Serv.</b>		
✓	<b>Conf. Screen</b>		
✓	<b>Letters</b>		
✓	<b>Duties/Supp</b>		
	<b>Objections</b>		
✓	<b>Video Receipt</b>		
✓	<b>CI Report</b>		
	<b>9202</b>	The proposed conservatee attempts to pay his bills, but places written checks with statement and does not mail payment. P.G.&E is threatening to shut off power because of unpaid bills. He makes impulsive purchases when watching television and responds unquestioningly to "investment offers" received in the mail. Recently he agreed to sell some real property for at least \$40,000 less than what it is worth in a transaction where the real estate agent represents both buyer and seller.	
✓	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
✓	<b>Citation</b>		
	<b>FTB Notice</b>		
<b>SEE ADDITIONAL PAGES</b>			

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**Report of Attorney Bagdasarian for Conservatee filed on 03/07/2014** states he has reviewed the Petition for Appointment of Probate Conservator of the Person filed 01/28/2014, the Court Investigator Investigation to Establish Temporary Conservatorship, the Confidential Supplemental Information filed 01/28/2014, the Amended Petition for Appointment of Temporary Conservator of the Person and Estate filed 02/28/2014 and Amended Capacity Declaration. Attorney Bagdasarian has discussed the Petition with J. Stanley Teixeira, the Attorney for the proposed Conservators Brian Snavelly and Brad Snavelly.

Attorney Bagdasarian visited the proposed Conservatee on 03/03/2014 and discussed with him the matters raised in the Petitions for Appointment of the Probate Conservator of the Person and Estate. In speaking with the proposed Conservatee, he was extremely adamant that he did not feel that he required the conservatorship of the person and estate to be imposed upon him and asked that it be dismissed. Mr. Snavelly's son has now moved in with him and is providing the necessary care the he needs. Mr. Snavelly handles most to his own banking matters and property issues and wants to continue to do the same. While the capacity declaration indicated a mild dementia, Mr. Snavelly does not believe that should effect his ability to handle his own health issues and manage his assets.

**Court Investigator Julie Negrete filed a report and a supplemental report on 03/04/2014.**