



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Probate Status Hearing Status RE: First Account

	PUBLIC GUARIDAN was appointed Conservator of the Person and Estate pursuant to Order filed 12/17/14.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need First Account or written status report pursuant to Local Rule 7.5.</p>	
	Final Appraisal was filed 7/2/15.		
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		<p>The Court set this status hearing for the filing of the First Account by the Public Guardian.</p> <p>Status Report filed 4/8/16 states the Public Guardian has been short-staffed and requests an additional 90 days.</p>
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: skc	
		Reviewed on: 4/7/16	
		Updates: 4/11/16	
		Recommendation:	
		File 1- Greenberg	

Petitioner: Johnny Nguyen (pro per)

Attorney: Val Dornay (for deceased conservator Ngoi Nguyen)

Petition for Appointment of Probate Conservator

		JOHNNY NGUYEN, brother, is petitioner	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator Advised Rights on 4/4/16.</p> <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Wednesday, May 25, 2016 at 9:00 a.m. in Department 303, for the filing the receipt for blocked account. • Wednesday, June 21, 2017 at 9:00 a.m. in Department 303, for the filing of the first account of successor Conservator, if required. <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>
		NGOI NGUYEN, father, was appointed conservator of the person and estate on 11/15/13. Ngoi Nguyen died on 4/20/15 leaving a vacancy.	
Cont. from		Please see petition for details.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv.	W/	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input checked="" type="checkbox"/>	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: 4/8/16
			Updates:
			Recommendation:
			File 2- Nguyen

Attorney Bell, Melinda, of San Juan Capistrano (for Petitioners Lee Ann Hitchman and Bruce Hitchman, Trustees)

Petition for Instructions and Authority for Trustee to Purchase Accessible Vehicle and Pay Caregiver

		<p>LEE ANN HITCHMAN and BRUCE HITCHMAN, licensed professional fiduciaries and Co-Trustees of the GAVIN KATIGBAK SPECIAL NEEDS TRUST, are Petitioners.</p> <p align="center">~Please see Petition for details~</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Trustee's bond is currently posted for a total of \$320,100.00. <i>Petition</i> does not but should address the amount and sufficiency of bond posted for the special needs pursuant to Probate Code § 2320. <i>Petition</i> does not address the need for increase of bond posted by Trustees related to the purchase of a vehicle by the special needs trust.</p> <p align="center">~Please see additional page~</p>	
Cont. from				
	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			X
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
<p>Reviewed by: LEG</p> <p>Reviewed on: 4/11/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 3- Katigbak</p>				

NEEDS/PROBLEMS/COMMENTS, continued:

2. *Petition* requests approval to spend up to **\$35,000.00** for the purchase of a vehicle for Beneficiary's transportation, while the prayer of the *Petition* in paragraph 2 requests spending up to **\$25,000.00** for the purchase of a vehicle for Beneficiary. Need clarification.
3. *Petition* states that the Trustees will do their normal due diligence prior to purchase of the vehicle, including independent inspection and review to determine if the investment is appropriate, and that the Trustees will report and account on the vehicle during the normal accounting period. Court may require Petitioners to submit purchase price estimates for a specific vehicle to be purchased for the Beneficiary, and if purchase is authorized, Court will require information regarding the vehicle purchased, as well as the vehicle reflected as an asset of the SNT on the property on hand schedule during the next period of accounting, pursuant to Section 4 of the special needs trust terms; or in the alternative, Court will require a lien hold placed on the vehicle in favor of the SNT, with the lien hold and the market and current values of the vehicle reflected on the property on hand of the SNT.
4. *Petition* states the SNT would pay **RISK MANAGEMENT SERVICES** for caregiver services rendered, as well as all payroll taxes, workers compensation insurance, and other employment related expenses, and requests the Court direct the payment of **\$12.00** per hour, plus all associated employment costs for caregiver for services 5 hours per day, 7 days per week, until further order of this Court. Need the total monthly amount the Trustees anticipate to pay to **RISK MANAGEMENT SERVICES** given that the **\$12.00** per hour requested does not include all payroll taxes, workers compensation insurance, and other employment related expenses that are also sought to be expended from the SNT.
5. Need proposed order pursuant to Local Rule 7.1 which provides a proposed order shall be submitted with all pleadings that request relief.

Note: *Petition* states Jana Keeley's pay stubs and tax return will be filed for the Court's review. Court records show the *Confidential Lodging of Supplemental Information to Petition for Instructions and Authority for Trustee to Purchase Accessible Vehicle and Pay Caregiver* was filed on 2/25/2016; the filing contains only an *Income and Expense Declaration* dated 1/4/2016, with no pay stubs or tax return included as indicated.

Petitioner: Cidney Taylor (Pro per – Mother)

Objector: Gina Walker (Pro per – Guardian)

Petition for Visitation

		CIDNEY TAYLOR, mother, is petitioner	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> Objector Derrick Walker (step-grandfather) is not presently a party to this case. He is the husband of Gina Walker (guardian).</p>
		GINA WALKER, paternal grandmother was appointed guardian of the minors on 11/10/2014.	
Cont. from		<p>OBJECTION TO PETITION FOR VISITATION filed 4/7/2016 by Gina Walker (guardian/paternal grandmother) and Derrick Walker (step-grandfather).</p> <p><i>See petition for details.</i></p>	
<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 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 checked="" type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: SEF
			Reviewed on: 4/7/2016
			Updates:
			Recommendation:
			File 4- Dixon

First Amended First and Final Account and Report of Executor, Petition for Final Distribution

DOD: 11/14/13	KIMBERLY KYLE HALL , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 012016, 030216	Accounting - \$300,000.00 Beginning POH - \$300,000.00 Ending POH - \$300,000.00	OFF CALENDAR. Order for Final Distribution signed on 3/17/16.
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Executor - waives	
<input checked="" type="checkbox"/> Inventory		
<input checked="" type="checkbox"/> PTC	Attorney - \$5,000.00 (less than statutory)	
<input checked="" type="checkbox"/> Not.Cred.	Proposed distribution is to:	
<input checked="" type="checkbox"/> Notice of Hrg	Kimberly Kyle Hall and Whitney Erin Hurd as Co-Trustees of the John J. Oppelt and Barbara J. Oppelt Revocable Trust.	
<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 checked="" type="checkbox"/> Letters 11/17/14		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input checked="" type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 4/7/16
		Updates:
		Recommendation:
		File 6- Oppelt

Attorney Linda K. Durost (for Petitioner Pamela Webb, Administrator)

First and Final Report of Administrator on Waiver of Account; for Allowance of Statutory Attorneys' Fees and Costs; and Petition for Final Distribution

DOD: 3/24/2013	PAMELA WEBB , daughter and Administrator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Accounting is waived.	
Cont. from 030916	I & A — \$182,300.00	
<input type="checkbox"/> Aff.Sub.Wit.	POH — \$182,300.00 <i>(no cash)</i>	
<input checked="" type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory	Administrator — waives	
<input checked="" type="checkbox"/> PTC	Attorney — \$6,469.00 <i>(statutory; to be paid outside probate per Status Conference Statement filed 4/6/2016;)</i>	
<input checked="" type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	Distribution pursuant to Decedent's Will is to:	
<input type="checkbox"/> Aff.Pub.	PAMELA WEBB – entire estate consisting of real property, vehicle, and furnishings, furniture, and personal belongings.	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters 101614	Status Conference Statement filed 4/6/2016 states:	
<input type="checkbox"/> Duties/Supp	<ul style="list-style-type: none"> At the most recent hearing on March 9, 2016, the Court indicated its willingness to approve the final petition pending receipt of information regarding the payment of the attorneys' fees and costs as set forth therein; All fees and costs are subject to payment directly from funds of the Petitioner/Administrator and are not coming from estate funds. Therefore, this estate is in a position to close. 	
<input type="checkbox"/> Objection		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input checked="" type="checkbox"/> FTB Notice		
		Reviewed by: LEG
		Reviewed on: 4/8/16
		Updates:
		Recommendation: SUBMITTED
		File 7- Lawler

Petition for Appointment of Guardian of the Person

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 3/2/16</u>: Examiner notes and workshop information provided in open court. The Court grants temporary orders; Letters are to issue forthwith.</p> <p><u>Note</u>: Petitioner filed “Proof of Service by Mail” on 1/20/16 and 3/14/16; however, Petitioner did not use the mandatory Judicial Council form GC-020 “Notice of Hearing – Guardianship or Conservatorship,” which contains mandatory information regarding the hearing date and should be served with a copy of the petition for guardianship.</p> <p>Therefore, the following issues remain noted:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing (Form GC-020). 2. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 on: <ul style="list-style-type: none"> - Juan Antonio Torres (Maternal Grandfather) - Eric Knighton (sibling) - Dominic Knighton (sibling) 	
Cont.d from 120915, 012016, 030216				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			x
<input type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	Clearances			
<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: skc		
		Reviewed on: 4/7/16		
		Updates:		
		Recommendation:		
		File 9 – Knighton		

Petitioner Hedrington, Selene J. (Pro Per – Mother – Petitioner)

Objector Wortham, Gary J. (Pro Per – Father – Objector)

Petition for Appointment of Probate Conservator of the Person

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> Page B is a competing petition filed by Gary Wortham (Father).</p> <p>Court Investigator advised rights on 12/1/15.</p> <p>Voting rights affected – need minute order.</p>	
Cont. from 121015, 012816, 030316				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			W
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
✓	Objections			
✓	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
		Reviewed by: skc		
		Reviewed on: 4/7/16		
		Updates:		
		Recommendation:		
		File 10A - Wortham		

Petition for Appointment of Probate Conservator

See petition for details.			<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator advised rights on 4/5/16.</p> <p>Voting rights affected – need minute order.</p>
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
✓	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 4/7/16
			Updates:
			Recommendation:
			File 10B- Wortham

Petitioner Guadalupe Salas (Pro Per, maternal grandmother)

Petition for Appointment of Guardian of the Person

		<p align="center">~Please see Petition for details~</p> <p>Court Investigator filed a report on 01/27/2016.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 3/9/2016.</u> Minute Order states examiner notes provided in open court. (Note: All defects have been addressed.)</p>	
Cont. from 020316, 030916				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	Clearances			
<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 / LEG		
		Reviewed on: 4/8/16		
		Updates:		
		Recommendation:		
		File 11- Luna & Petris		

12 Stevee Barboza, Apollonia Barboza (GUARD/P) Case No. 15CEPR01160

Petitioner: Gabrielle Vasquez (pro per)

Petitioner: Carmen Barbosa (pro per)

Objector: Caroline Barboza (pro per)

Objector: Steve Delsid (pro per)

Petition for Appointment of Guardian of the Person

		<u>TEMPORARY EXPIRES 3/2/16</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 temporary petition or Consent and Waiver of Notice or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. Ronaldo Rubio (father of Apollonia) 2. Objections were not served on all interested parties.
		<p>CARMEN BARBOSA, maternal grandmother, and GABRIELLE VASQUEZ, sister, are petitioners.</p> <p>Please see petition for details.</p> <p>Objections to Guardianship filed by Caroline Barboza (mother) on 12/4/15.</p> <p>Objections to Guardianship filed by Steve Delsid (father) on 12/4/15.</p> <p>Court Investigator Jennifer Daniel's Report filed on 2/24/16.</p>	
Cont. from 030216			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
	Aff.Mail		
	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		
		Reviewed by: KT	
		Reviewed on: 4/7/16	
		Updates:	
		Recommendation:	
		File 12 – Barboza	

13
 Petitioner
 Attorney

Eulalia Martinez Rosales (CONS/P)
 Camacho, Rosalba (Pro Per – Daughter – Petitioner)
 LeVan, Nancy J. (Court appointed for Proposed Conservatee)

Case No. 16CEPR00109

Petition for Appointment of Probate Conservator of the Person

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 2/22/16 Voting rights affected – need minute order Continued From 3/2/16. The following issues remain noted: 1. The Capacity Declaration does not address dementia medication powers; only dementia placement. The Court may require clarification or revised capacity declaration. 2. Need video receipt per Local Rule 7.15.8.A.	
Cont. from 030216				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			W
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			X
✓	CI Report			
	9202			
✓	Order			X
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
		Reviewed by: skc		
		Reviewed on: 4/7/16		
		Updates: 4/11/16		
		Recommendation:		
		File 13- Rosales		

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

Petition for Appointment of Probate Conservator of the Person and Estate

		NO TEMPORARY REQUESTED	<p>JILL WILLIAMS and KEN WILLIAMS, parents, are Petitioners and request appointment as Co-Conservators of the Person with medical consent powers, and as Co-Conservators of the Estate with bond of \$10,000.00.</p> <p style="text-align: center;">~Please see <i>Petition</i> for details~</p> <p>Court Investigator's Report was filed on 3/21/2016.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 3/14/2016 per request of counsel.</p> <ol style="list-style-type: none"> Based upon the estimated value of the estate indicated in Item 3(e) of the <i>Petition</i>, it appears there is no need for conservatorship of the estate nor for posting of bond. <i>Petition</i> filed 2/25/2016 includes <i>Exhibit A</i>, which contains a copy of the <i>Capacity Declaration</i> of Brad Sumrell, M.D., such that this document has become part of public Court records. Probate Code § 2620(c)(7) provides in sum that if any document to be filed with the Court contains personal information regarding the proposed Conservatee that would not ordinarily be disclosed in pleadings filed in the action, the document shall be filed confidentially and the Clerk of the Court shall keep the document confidential, except to the Court and subject to disclosure only upon an order of the Court. The Court may order that the copy of the <i>Capacity Declaration</i> be stricken and removed from the <i>Petition</i> filed 2/25/2016, and may instruct the Clerk to re-scan the <i>Petition</i> filed 2/25/2016 into Court records without the copy of the <i>Capacity Declaration</i>, to ensure the information is protected. <p style="text-align: center;">~Please see additional page~</p>
Cont. from 032916				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg	X		
<input type="checkbox"/>	Aff.Mail	X		
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Sup			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt	X		
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input checked="" type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		Reviewed by: LEG		
		Reviewed on: 4/8/16		
		Updates:		
		Recommendation:		
		File 14- Williams		

NEEDS/PROBLEMS/COMMENTS, continued:

3. Need *Notice of Hearing* and proof of service by mail of the notice with a copy of the *Petition for Appointment of Probate Conservator* showing notice was mailed at least **15 days** before the hearing pursuant to Probate Code § 1822 for all of the relatives named in the *Petition* pursuant to Probate Code § 1822(b)(2). The *Notice of Hearing [mandatory-use Judicial Council form GC-020]* is required to be served on all interested parties. The *Proof of Service by Mail of the Notice of Hearing* that must be filed shall indicate that a copy of the *Petition* was sent with the notice as required by Probate Code § 1822(a). Alternatively to Petitioners filing additional proofs of mailed service, the Court may deem the six *Proof of Personal Service of Notice of Hearing and Related Documents [on specified persons]* filed in the instant proceedings as satisfactory to demonstrate the required service to all relatives named in the *Petition*; however, a *mandatory-use Judicial Council form GC-020 Notice of Hearing* must be filed with the Court, demonstrating that the persons who were served received adequate notice and the appropriate information contained within the mandatory-use notice form.
4. Item 5(f) of the *Petition* indicates the proposed Conservatee is developmentally disabled. Need proof of mailed service of the *Notice of Hearing* with a copy of the *Petition for Appointment of Probate Conservator*, showing service was mailed at least **30 days** before the hearing to Central Valley Regional Center (CVRC) as defined in § 1827.5, pursuant to Probate Code § 1822(e), or waiver of such notice by CVRC to be filed with the Court.
5. Twelve *Citation for Conservatorship* forms have been filed in the instant proceeding. Of these, only one is appropriately filed pursuant to Probate Code § 1823(a), directed to the proposed Conservatee, showing proof of personal service of the *Citation* to the proposed Conservatee pursuant to Probate Code § 1824. It appears the process server fees for serving the eleven unnecessary *Citations* to the proposed Conservatee's relatives (including the Petitioners) apparently totaling **~\$314.50** are costs that need not have been incurred.
6. The six *Proof of Personal Service of Notice of Hearing and Related Documents [on specified persons]* filed in the instant proceedings indicate that copies of the following Court documents intended to be kept confidential were, but should not have been, served to the relatives of the proposed Conservatee listed in the *Petition*: *Capacity Declaration – Conservatorship*; *Confidential Conservator Screening Form (of each Petitioner)*; and *Confidential Supplemental Information*.
7. Need *Conservatorship Video Viewing Certificate* pursuant to Local Rule 7.15.9(A). Court's website <http://www.fresno.courts.ca.gov/Probate/conservatorship> provides a link to view the video and a printable receipt for viewing by each Petitioner that must be filed with the Court.

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under the IAEA

DOD: 5/31/15			<p>LESTER M. PIECZONKA, Named Executor without bond, is Petitioner.</p> <p>Petitioner is a resident of Wyckoff, New Jersey.</p> <p>Full IAEA – ok</p> <p>Will dated 2/17/87</p> <p>Residence: Fresno Publication: Business Journal</p> <p>Estimated value of estate: Personal property: \$265,000.00</p> <p>Probate Referee: Rick Smith</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Will is not self-proving. Need Proof of Subscribing Witness pursuant to Probate Code §8220. The will names an alternate executor, Edward Youhas, who is not listed at #8 of the petition and who was not given notice of this petition. Need proof of service of Notice of Petition to Administer Estate on Edward Youhas at least 15 days prior to the hearing pursuant to Probate Code §8110. Petitioner resides in Wyckoff, New Jersey; therefore, the Court may require bond of \$265,000.00 pursuant to Probate Code §8571. <p>Note: If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> Wednesday, May 25, 2016 for filing of bond, if required. Wednesday, September 14, 2016 for filing the Inventory and Appraisal Wednesday, June 14, 2017 for filing the first account or petition for final distribution.
<input type="checkbox"/>	Aff.Sub.Wit.	x		
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail	w		
<input type="checkbox"/>	Aff.Pub.	x		
<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: skc</p> <p>Reviewed on: 4/7/16</p> <p>Updates: 4/8/16</p> <p>Recommendation:</p> <p>File 15- Amico</p>				

Petition to Determine Succession to Real Property

DOD: 6/5/05	<p>PATRICIA FAYE WHITAKER, Daughter and Successor Trustee of the Earl Wayne Wells and Imagene Wells Family Trust of 1992, is Petitioner.</p> <p>40 days since DOD</p> <p>Earl Eugene Wells, Discharged Executor of the Estate of Earl Wells in 06CEPR00575, consents to use of this procedure.</p> <p>I&A: \$75,000.00 - real property in Selma, CA, APN 389-270-22 (See Declaration filed 4/11/16 for specific interest.)</p> <p>Will dated 9/24/92 devises the residue of the estate to the trust.</p> <p>Petitioner requests Court determination that the real property passes to her as trustee of the Earl Wayne Wells and Imagene Wells Family Trust of 1992 pursuant to the decedent's will.</p>	NEEDS/PROBLEMS/COMMENTS:
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory		
PTC		
Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail w		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 4/7/16
		Updates: 4/11/16
		Recommendation: SUBMITTED
		File 16- Wells

Petition for Probate of Will and for Letters of Administration with Will Annexed with IAEA

DOD: 10/19/15	BLANCHE WELLIVER , Sister, is Petitioner and requests appointment as Administrator with Will Annexed with Full IAEA with bond of \$140,000.00.	NEEDS/PROBLEMS/ COMMENTS: 1. The Court may require further diligence and/or notice to the decedent's children, who are beneficiaries under the will. <u>Note:</u> If granted, the Court will set status hearings as follows: <ul style="list-style-type: none"> • Wednesday, May 25, 2016 for filing of bond, if required. • Wednesday, September 14, 2016 for filing the Inventory and Appraisal • Wednesday, June 14, 2017 for filing the first account or petition for final distribution.
	Both named executors are deceased.	
	Full IAEA – ok	
✓ Aff.Sub.Wit.	Will dated 7/1/66 – See Declaration re Signature and Handwriting of Decedent under Probate Code §8221 (no subscribing witness available).	
✓ Verified	Residence: Fresno Publication: Business Journal	
Inventory	Estimated value of estate: Real property: \$140,000.00	
PTC	Probate Referee: Steven Diebert	
Not.Cred.	Petitioner states she is a 1/3 beneficiary of the estate. While the other two beneficiaries named in the will, who are the children of the decedent, have higher priority than Petitioner, their whereabouts are unknown to Petitioner. The decedent was divorced from his spouse in 1956. His spouse took the children with her and departed from the State of California. It is believed that they resided in the State of Oregon for a time. The decedent had completely lost contact with his children and this condition existed for over 45 years prior to the decedent's death. At the time of his death, the decedent did not know if his children were living or deceased, did not know their whereabouts, and did not have any last known addresses for either his children or his ex-wife among his records. The attorney conducted an online search for the ex-wife and children, but did not produce any definitive leads. Petitioner is informed and believes and thereon alleges that the decedent's children are unaware of his death and she has no way to contact or communicate with them.	
✓ Notice of Hrg		
✓ Aff.Mail	w/o	
✓ Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
✓ Letters		
✓ Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Reviewed by: skc
Reviewed on: 4/8/16
Updates:
Recommendation:
File 18- Myers

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer under IAEA

DOD: 6/26/15		<p>NANCY LYNN PENNY and DAVID JAMES CUCUK, Named Alternate Executors without bond, are Petitioners.</p> <p>Named Executor Branko Bill Cucuk declines to act and nominates Petitioners. The Third Named Alternate Executor, Debra Ann Lombard, is deceased.</p> <p>Full IAEA – ok</p> <p>Will dated 1/28/83</p> <p>Residence: Fowler (unincorporated) Publication: Business Journal</p> <p>Estimated value of estate: Real property: \$700,000.00</p> <p>Probate Referee: Steven Diebert</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> The Court will set status hearings as follows:</p> <ul style="list-style-type: none"> • Wednesday, September 14, 2016 for filing the Inventory and Appraisal • Wednesday, June 14, 2017 for filing the first account or petition for final distribution. 	
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.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w
<input checked="" type="checkbox"/>	Aff.Pub.			
<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			
Reviewed by: skc				
Reviewed on: 4/8/16				
Updates:				
Recommendation: SUBMITTED				
File 19- Cucuk				

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer under IAEA

DOD: 11/28/15		<p>DANIEL JOSEPH JUNIOR LEBLANC, Grandson and Named Executor without bond, is Petitioner.</p> <p>Full IAEA – ok</p> <p>Will dated 12/25/13</p> <p>Residence: Kerman Publication: Kerman News</p> <p>Estimated value of estate: Personal property: \$13,000.00 Real property: \$41,506.75 (\$153,371.00, encumbered for \$111,864.25)</p> <p>Probate Referee: Steven Diebert</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: The Court will set status hearings as follows:</p> <ul style="list-style-type: none"> • Wednesday, September 14, 2016 for filing the Inventory and Appraisal • Wednesday, June 14, 2017 for filing the first account or petition for final distribution. 	
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.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W
<input checked="" type="checkbox"/>	Aff.Pub.			
<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			
			Reviewed by: skc	
			Reviewed on: 4/8/16	
			Updates: 4/11/16	
			Recommendation: SUBMITTED	
			File 20- Schroeder	

Probate Status Hearing RE: Filing of the 19th Account

	MICHAEL PAPPOCODA and JOYCE THOMAS are Co-Trustees.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 3/30/16. Minute order states Counsel represents that the petition is drafted; and he anticipates filing it within the next week. No appearance is necessary at the status hearing if the petition is filed at least two court days prior to 4/13/16.</p> <p>1. Need 19th account</p>
	The 18 th account with an account period ending on 12/231/14 was approved on 7/1/15.	
Cont. from 033016		
Aff.Sub.Wit.	Minute order dated 7/1/15 set this status hearing for the filing of the 19 th account.	
Verified		
Inventory		
PTC		
Not.Cred.	Status Report filed on 3/28/16 states it is the practice of the Trustee to turn over the trust books and records to James Eberwein, CPA. Mr. Eberwein then prepares the trust income tax returns and the court accounting which serves as the basis for the preparation of the petition.	
Notice of Hrg	Mr. Knudson states he met with Mr. Eberwein on 3/22/16. On 3/25/16 he received the revised and corrected accounting.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt	The petition is substantially drafted but his is unsure if it will be filed prior to March 30, 2016.	
CI Report		
9202		
Order	Co-Trustee Michael Pappacoda died on 2/18/16. Thus the petition will request appointment of a successor co-trustee to act with Joyce Thomas.	
Aff. Posting		
Status Rpt	It is respectfully requested that the court continue the status hearing for a period of two weeks or such time as the court deems appropriate.	
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 4/8/16
		Updates:
		Recommendation:
		File 22- Goering

Petitioner Snow, Russell Leon (Pro Per – Maternal Great-Uncle – Petitioner)

Petitioner Klein, Lorie (Pro Per – Maternal Great-Aunt – Petitioner)

Petition for Appointment of Temporary Guardian of the Person

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: 1. If diligence is not found, need notice to the father pursuant to Probate Code §2250(e).
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 4/8/16
			Updates:
			Recommendation:
			File 23- Phillips