



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.

DOD: 04/05/03	EDWARD L. MYERS, JR. and MONIQUE M. HUTCHINGS , were appointed as Co-Administrator's with Will Annexed on 08/19/03.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 02/10/15 Minute Order from 02/10/15 states: Counsel represents that the eviction process was initiated last week; the Court will allow 60 more days. If the petition is not filed, a status report, verified by the Administrator, is required to be filed at least 2 court days prior to the hearing.</p> <p>As of 04/08/15, nothing further has been filed in this matter.</p> <ol style="list-style-type: none"> Status Report filed 02/05/15 is unverified by the Administrator. <p>Note: Proof of service attached to the Status Report filed 02/05/15 is not filled out and not signed.</p>
Cont. from 021015	Letters of Administration with Will Annexed were issued on 08/19/13.	
Aff.Sub.Wit.		
Verified		
Inventory	Inventory & Appraisal , partial No. 1 filed 04/08/04 - \$707,312.97	
PTC	Inventory & Appraisal , final filed 04/21/04 - \$16,968.64	
Not.Cred.		
Notice of Hrg	Inventory & Appraisal , partial No. 1 corrected filed 11/10/04 - \$877,312.97	
Aff.Mail		
Aff.Pub.	Petition for Preliminary Distribution and Statutory Fees filed 03/16/05 was granted on 06/02/05.	
Sp.Ntc.		
Pers.Serv.	Ex Parte Petition for Amended Letters granted 05/30/13 ordered that Monique M. Hutchings is the sole Administrator following the death of Edward L. Myers, Jr. and set this matter for status.	
Conf. Screen		
Letters	Amended Letters of Administration with Will Annexed were issued on 06/05/13.	
Duties/Supp		
Objections	Minute Order from Probate Status Hearing Re: Failure to File a Final Account or Petition for Final Distribution held on 01/09/15 set this matter for an Order to Show Cause and states: There are no appearances in this matter. The Court issues an Order to Show Cause as to why the Co- Administrators should not be removed for failure to file the Final Account or Petition for Final Distribution. Mr. Sullivan and the Co-Administrators are each ordered to be personally present in court on 02/10/15. Clerk's Certificate of Mailing attached to the Minute Order indicates that a copy of the Minute Order was mailed to Robert Sullivan on 01/09/15.	
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed on: 04/08/15
		Updates:
		Recommendation:
		File 1 - Myers

Status Report filed 02/05/15 states: most of the property was distributed to the beneficiaries in a preliminary distribution by order of this Court on 06/02/05. The estate contains a bank account with a balance of \$152,980.00 at this time. The Court also allowed the Co-Administrators to form an LLC to hold the remaining assets of the estate, namely, four parcels of environmentally contaminated real property. Pursuant to the Court's order, the Elm & Church, LLC was formed and currently holds a bank account with a balance of \$50,000.00 as well as the four parcels of real property. At the time of decedent's death, an environmental contamination problem related to previously installed underground fuel storage tanks had been discovered and was in the process of being analyzed and remediated by the Decedent utilizing Krazan & Associates ("Krazan").

Krazan determined the existence of contamination from the underground fuel storage tanks and enrolled the property in the State of California Environmental Cleanup Fund, which reimburses property owners for expenses incurred in the identification, analysis and remediation or underground storage tank contamination. Remediation efforts on the property has been ongoing.

During the administration of the estate, Krazan determined the nature and extent of the environmental contamination and commenced procedures for the remediation of the contamination discovered. All expenses incurred by the estate in connection with the valuation and remediation of the contamination have been reimbursed by the State of California.

As reported in the Petition for Preliminary Distribution filed 03/16/05, the estate's membership interest in the LLC would continue to be held in the estate pending final resolution of the environmental concerns, since distribution of the LLC membership interest to the beneficiaries could expose the beneficiaries to the potential for individual liability, or actual individual liability. In her last status report, the Administrator reported that she thought the remediation could be completed within 3 to 4 months. However, the California Regional Water Quality Control Board – Central Valley Region ("RWQCB"), after inspection of the Property, refused to qualify the case for closure and did not provide a closing letter. The RWQCB instead requested further remediation as well as a study to determine whether current concentrations of petroleum hydrocarbon constituents ("PHCs") on the property pose a threat to human health. The Administrator asked Krazan to provide remediation proposal to the RWQCB, which it did on 02/28/14. The RWQCB has issued a statement that "case closure may be appropriate" for the property. It issued a "Preclosure Public Notification" on 05/21/14, which stated that a "Public Notice" proposing the site closure would be mailed to certain interested parties. The Notification stated that the case would be open for public comment until July 20, 2014. Upon completion of the public comment period, and in the absence of substantive comments against closure, the RWQCB will perform a closure inspection of the Property and issue a case closure letter.

No comments were received from the public and the RWQCB issued a letter to Monique Hutchings stating that the wells on the property should be destroyed and the site should be restored before a closure inspection by the RWQCB would occur and a closing letter would thereafter issue. The closing letter finally issued from RWQCB on 10/13/14 and Monique Hutchings proceeded to put the property up for sale.

Administrator found a buyer for a portion of the property and that buyer is in the process of borrowing the funds necessary to purchase the rest of the property. However, the tenant currently on the property is seriously delinquent on his rent and Administrator is now beginning eviction proceedings against him. The property should not be distributed while eviction proceedings are proceeding and part of the property is left unsold. Therefore a 2 month continuance is requested in order to allow time to facilitate a sale of the property and prepare and file the Petition for Final Distribution.

Petition for Letters of Special Administration without General Powers

Age:		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Order Appointing Special Administrator was signed ex parte on 3/5/15 and will expire 6/15/15.</p>
DOD:		
Cont. from		
	Aff.Sub.Wit.	
	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	
		Reviewed by: skc
		Reviewed on: 4/8/15
		Updates:
		Recommendation:
		File 2 - Jamison

3 Rosie V. Bryson (Estate)

Case No. 14CEPR00522

Atty Helon, Marvin T. (for Kathryn V. Bryson – Administrator with Will Annexed – Petitioner)

1) First and Final Account and Report of Administrator, and 2) Petition for Its Settlement, 3) for Allowance of Statutory Fees and Reimbursement of Costs, and 4) for Final Distribution

DOD:4/19/14	KATHRYN V. BRYSON , Daughter and Administrator with Will Annexed with Full IAEA without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 4/20/14 – 1/31/15	
	Accounting: \$192,841.51	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH: \$192,641.51	
<input checked="" type="checkbox"/> Verified	Ending POH: \$191,686.37	
<input checked="" type="checkbox"/> Inventory	(\$60,986.37 cash plus real property, two vehicles, personal property)	
<input checked="" type="checkbox"/> PTC		
<input checked="" type="checkbox"/> Not.Cred.	Administrator (Statutory): Waived	
<input checked="" type="checkbox"/> Notice of Hrg	Attorney (Statutory): \$6,752.81	
<input checked="" type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.	Costs: \$1,671.64 (filing, publication, certified letters, appraisal)	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Distribution pursuant to Decedent's will:	
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters	Kathryn V. Bryson: \$25,905.96 cash plus a 50% undivided interest in the real property, two vehicles, personal property	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt	Gary W. Bryson: \$25,905.96 cash plus a 50% undivided interest in the real property, two vehicles, personal property	
<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: skc
		Reviewed on: 4/8/15
		Updates:
		Recommendation: SUBMITTED
		File 3 - Bryson

(1) First and Final Account and Report of Executor and Petition for Its Settlement, for (2) for Allowance of Fees and Reimbursement of Costs, and for (3) Final Distribution

DOD: 3/7/14		<p>IRAN RODRIGUES, Surviving Spouse and Executor with Full IAEA without bond, is Petitioner.</p> <p>Account period: 3/7/14 – 12/31/14 Accounting: \$428,333.33 Beginning POH: \$428,333.33 Ending POH: \$428,333.33 (real property and business interest)</p> <p>Administrator (Statutory): Waived</p> <p>Attorney (Statutory): \$11,567.00</p> <p>Costs: \$1,759.83 (filing, publication, certified letters, appraisal)</p> <p>Pursuant to Agreement for Payment of Attorneys Fees and Costs, Trenton J. Marks and Cassie J. Rettig, beneficiaries hereunder, agree to each pay a share of the approved fees and costs as set forth in the agreement.</p> <p>Distribution pursuant to Decedent's will:</p> <p>Trenton J. Marks: Decedent's real property in Fresno, CA</p> <p>Cassie J. Rettig: Decedent's 1/3 undivided interest in real property in Shaver Lake, CA, plus Decedent's business interests.</p>	NEEDS/PROBLEMS/COMMENTS:	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input checked="" type="checkbox"/>	PTC			
<input checked="" type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input checked="" type="checkbox"/>	FTB Notice			
		Reviewed by: skc		
		Reviewed on: 4/8/15		
		Updates:		
		Recommendation: SUBMITTED		
		File 4 – Best-Rodrigues		

DOD: 8-1-13	PRIMAVERA DAMME , Daughter, is Petitioner and requests appointment as Administrator with Full IAEA with bond of \$175,000.00.	NEEDS/PROBLEMS/COMMENTS:
		Note: This is the 5th hearing on this petition. The following issues remain:
Cont from 110314, 120314, 011315, 030315	Petitioner is a resident of Mesa, AZ.	1. Need Order.
<input type="checkbox"/> Aff.Sub.Wit.	Full IAEA – ok	2. Need Letters.
<input checked="" type="checkbox"/> Verified	Decedent died intestate	Note: If granted, status hearings will be set as follows:
<input type="checkbox"/> Inventory	Residence: Fresno	• Tues, June 2, 2015 for filing of bond
<input type="checkbox"/> PTC	Publication: Business Journal	• Tues, Sept. 15, 2015 for filing of inventory and appraisal
<input type="checkbox"/> Not.Cred.	Estimated value of estate:	• Tues, July 14, 2016 for filing of the first account or petition for final distribution.
<input checked="" type="checkbox"/> Notice of Hrg	Personal property: \$ 5,000.00	If the above items have been properly filed pursuant to Local Rule 7.5, the status hearings may come off calendar. Otherwise, status report is required.
<input checked="" type="checkbox"/> Aff.Mail	Real property: \$ 170,000.00	
<input checked="" type="checkbox"/> Aff.Pub.	Total: \$ 175,000.00	
<input type="checkbox"/> Sp.Ntc.	Probate Referee: Rick Smith	
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		Reviewed by: skc
<input type="checkbox"/> Objections		Reviewed on: 4-8-15
<input type="checkbox"/> Video Receipt		Updates: 4-9-15
<input type="checkbox"/> CI Report		Recommendation:
<input type="checkbox"/> 9202		File 5 – Valencia
<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		

Probate Status Hearing RE: Accounting of Dana Kahler and Waivers of Bond

DOD: 01/17/13	<p>JENNIFER KAPUR KIRKLIN, granddaughter and beneficiary filed a Petition for Removal of Trustee, Account and to Appoint Successor Trustee on 11/03/14.</p> <p>On 01/27/15, Respondent, Dana Kahler, filed a Response of Trustee of Petition for Removal of Trustee Account and to Appoint Successor Trustee.</p> <p>Minute Order from hearing on 02/03/15 set this matter for a Status Hearing re: Accounting of Trustee and Waivers of Bond.</p> <p>Status Declaration of Counsel for Trustee Regarding Accounting filed 02/26/15 states: The Court ordered the Trustee to file an accounting with the Court by 03/03/15. Attorney received the accounting documents from the trustee on 02/25/15 and has not been able to prepare the accounting in the court format. It appears that all of the information is there to prepare the accounting, but additional time will be needed. A 30 day continuance is respectfully requested.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 03/03/15 Minute Order from 03/03/15 states: Mr. Teixeira is appearing via CourtCall. Matter continued to 04/14/15 for the accounting of Dana Kahler and waivers of bond. If the required documents are filed two court days before the hearing, no appearance will be necessary.</p> <p>As of 04/08/15, nothing further has been filed.</p>
Cont. from 030315		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
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Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 04/08/15
		Updates:
		Recommendation:
		File 6 - Kasabian

Petition for Appointment of Probate Conservator of the Estate (Prob. C. 1820, 1821, 2680-2682)

		NO TEMPORARY REQUESTED	<p>JILL MCCOOL, daughter, is Petitioner and requests appointment as Conservator of the Estate with Probate Code § 2590 powers.</p> <p style="text-align: center;">~Please see <i>Petition for details</i>~</p> <p>Court Investigator's Report was filed on 2/24/2015.</p> <p style="text-align: center;"><i>[Additional page omitted]</i></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;">OFF CALENDAR <i>First Amended Petition for Appointment of Probate Conservator filed 4/6/2015 is set for hearing on 5/18/2015.</i></p> <p>Court Investigator Advised Rights on 2/24/2015.</p> <ol style="list-style-type: none"> Caption of the <i>Petition</i> requests appointment of probate conservator of the estate only. Item 1(a) and 1(b) of the <i>Petition</i> request appointment of both conservator of the person and of the estate. Item 1(g) of the <i>Petition</i> requests the proposed Conservatee be adjudged to lack the capacity to give informed consent for medical treatment, which is a request associated with conservatorship of the person. Further, Item 5(c) of the <i>Petition</i> states the reasons the proposed Conservatee requires a conservator of the person are not applicable as the <i>Petition</i> is for conservatorship of the estate only. Need clarification and/or amended <i>Petition</i>. <i>Capacity Declaration</i> was filed on 2/4/2015, and <i>Declaration of Gary L. Winter</i> was filed 2/18/2015 to include the previously omitted Page 2 of the <i>Capacity Declaration</i>. However, because the <i>Petition</i> does not request conservatorship of the person, the purpose of these filings is unclear unless the <i>Petition</i> is amended to include a clear request for conservatorship of the person. <p style="text-align: center;"><i>[Additional page omitted]</i></p>
Cont. from 030315				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg	X		
	Aff.Mail	X		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.	X		
	Conf. Screen	X		
✓	Letters			
✓	Duties/Supp			
	Objections			
✓	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation	X		
	FTB Notice			
<p>Reviewed by: LEG</p> <p>Reviewed on: 4/9/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7 - Britton</p>				

Atty McKinney, Russell R., of Visalia (for Petitioner Mickey Lee Chaffin)

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

DOD: 8/21/2014	MICKEY LEE CHAFFIN , son, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	40 days since DOD	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.	No other proceedings	
<input checked="" type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory	I & A - \$ 85,000.00	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Will dated 10/22/1997 devises entire estate to spouse (DOD 10/29/2000), and if spouse predeceased, then to Petitioner.	
<input checked="" type="checkbox"/> Aff.Mail	w/	
<input type="checkbox"/> Aff.Pub.	Petitioner requests Court determination that Decedent's 100% interest in real property located at 908 Ninth, Orange Cove, passes to the Petitioner pursuant to Decedent's Will.	
<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: LEG
		Reviewed on: 4/9/15
		Updates:
		Recommendation: SUBMITTED
		File 9 - Chaffin

Probate Status Hearing Re: Failure to File Petition for Final Distribution

DOD: 3-7-06		<p>HAL B. HAVLISCH was appointed Executor with Full IAEA without bond and Letters issued on 5-24-06.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> The Executor, attorney Hal B. Havlisch, was previously represented by attorney Thomas C. Peterson, now deceased.</p>																																														
<p>Cont'd from 31414, 111814, 120914, 021015</p>																																																	
<table border="1"> <tr><td>Aff.Sub.Wit.</td><td></td></tr> <tr><td>Verified</td><td></td></tr> <tr><td>Inventory</td><td></td></tr> <tr><td>PTC</td><td></td></tr> <tr><td>Not.Cred.</td><td></td></tr> <tr><td>Notice of Hrg</td><td></td></tr> <tr><td>Aff.Mail</td><td></td></tr> <tr><td>Aff.Pub.</td><td></td></tr> <tr><td>Sp.Ntc.</td><td></td></tr> <tr><td>Pers.Serv.</td><td></td></tr> <tr><td>Conf. Screen</td><td></td></tr> <tr><td>Letters</td><td></td></tr> <tr><td>Duties/Supp</td><td></td></tr> <tr><td>Objections</td><td></td></tr> <tr><td>Video Receipt</td><td></td></tr> <tr><td>CI Report</td><td></td></tr> <tr><td>9202</td><td></td></tr> <tr><td>Order</td><td></td></tr> <tr><td>Aff. Posting</td><td></td></tr> <tr><td>Status Rpt</td><td></td></tr> <tr><td>UCCJEA</td><td></td></tr> <tr><td>Citation</td><td></td></tr> <tr><td>FTB Notice</td><td></td></tr> </table>		Aff.Sub.Wit.		Verified		Inventory		PTC		Not.Cred.		Notice of Hrg		Aff.Mail		Aff.Pub.		Sp.Ntc.		Pers.Serv.		Conf. Screen		Letters		Duties/Supp		Objections		Video Receipt		CI Report		9202		Order		Aff. Posting		Status Rpt		UCCJEA		Citation		FTB Notice		<p>Final Inventory and Appraisal filed 10-27-06 indicated a total estate value of \$148,162.92, including \$3,517.92 cash plus real property, personal property including a stamp collection valued at \$1,500.00, and a vehicle.</p> <p>On 11-30-06, a Notice of Proposed Action was filed indicating that the Executor intended to sell the real property for \$100,000.00 cash.</p> <p>Nothing further was filed.</p> <p>On 12-20-13, the Court set this status hearing for failure to file a first account or petition for final distribution and mailed notice to Hal B. Havlisch.</p> <p>The most recent status report was filed on 12-4-14. See Page 2.</p>	<p><u>Note:</u> The decedent's will devises the entire estate to GOOD SHEPHERD LUTHERAN HOME OF THE WEST in Fountain Valley, CA.</p> <p><u>Minute Order 2-10-15:</u> The Court directs that a Corrected Inventory and Appraisal be filed if the original was incorrect. If the petition is not filed by 4-10-15, then a verified status report must be filed by the same date.</p> <p>As of 4-8-15, nothing further has been filed.</p> <p><u>Note:</u> See Page 2 re updated status report.</p> <p>1. Need first account or petition for final distribution.</p> <p><u>Note:</u> This estate has been open since 2006 (over 8 years) without accounting.</p>
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		<p>Recommendation:</p>																																															
		<p>File 10 – Muhley</p>																																															

Page 2

Status Report filed 12-4-14 states the house has decreased in value to \$72,000 in 2008 and has now increased to \$123,000 according to www.zillow.com. The home was built in 1927. Executor has made all necessary repairs out of his own funds including a new foundation, wiring, plumbing, roof, refrigeration and heating unit, kitchen, floor, interior and exterior paint, window treatments, termite damage.

The Executor states when the repairs were done the home was rented in June 2011 to a disabled woman who was receiving Section 8 subsidy. The only money received was from what Section 8 paid, as the tenant could not afford additional rent. The home is not in the best of areas and it was considered a good investment to not have the home sitting empty to avoid damage due to vandalism. The tenant paid utilities and kept up the property while the remaining repairs were done.

The house is now empty and has been listed with London Properties for \$130,000.00. The 1977 Dodge Monaco Broagham was sold for the appraised value of \$2,500.00, although there were expenses involved in the sale of the vehicle (smog, DMV, etc.). The furniture has been sold for the appraised value. The stamp collection is intact and can be disbursed to the beneficiaries. At the present time, there is no estate bank account, but estate funds have been placed in Executor's attorney's trust account with an approx. balance of \$600.00.

Executor states the Waiver of Accounting and Petition for Final Distribution will be filed at the close of escrow.

Examiner's Note: *Mr. Havlisch states funds have been placed in his attorney's trust account; however, Mr. Havlisch is now self-represented and used a non-attorney legal document service to file this status report. Need clarification regarding the "attorney trust account."*

Status Report filed 1-20-15 states the I&A filed 10-27-06 states an incorrect value (\$140,000.00). The home was originally listed with a realtor for \$130,000.00, but there has been a low interest at the listed price; therefore, the listing price has been lowered to \$124,900.00.

Examiner's Note: *The I&A value is the value as of the decedent's date of death, not the market value. However, if the Executor feels that the I&A value is incorrect, a Corrected I&A should be filed.*

	<p>FRANCIS KENNEDY is Conservator of the Person and Estate.</p> <p>The Conservator's Third Account was settled on 10-31-13 and the Court set this status hearing for the filing of the Fourth Account.</p> <p>Status Hearing Report filed 2-24-14 by Attorney Lisa Horton of Walters & Moshrefi states they are in the process of drafting the fourth account and report. They need final bank information from their client, which they are in the process of obtaining. A continuance of 45 days is requested to complete and file the fourth account.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 2-27-15. If accounting is filed at least 2 court days prior to continued date, no appearance is necessary.</u></p> <p><u>As of 4-8-15, nothing further has been filed.</u></p> <p>1. Need Fourth Account.</p>
Cont. from 022715		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
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		Reviewed by: skc
		Reviewed on: 4-8-15
		Updates:
		Recommendation:
		File 11 - Clover

	BRANDI CHAVONNE LANIER , guardian, filed an ex parte Petition to Fix Residence Outside the State of California on 3-6-14.	NEEDS/PROBLEMS/COMMENTS: Minute Order 1-6-15: Ms. Lanier is to advise her legal help that the Court needs an estimated date as to when the guardianship can be established in Missouri. 1. Need proof of establishment of guardianship or equivalent in Missouri pursuant to Probate Code §2352(d).
Cont. from 071814, 111814, 010615	The Court set the matter for hearing on 3-19-14.	
Aff.Sub.Wit.		
Verified	At the hearing on 3-19-14, the Court granted the petition and set this status hearing for the filing of proof of guardianship in Missouri.	
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Status Report filed 7-9-14 states the family move to Springfield, Missouri on 3-22-14. Since moving, Caitlin and Autumn have been doing well and are in communication with their parents. On 6-23-14, Mrs. Lanier met with an attorney from Legal Services of Southern Missouri, who told her that guardianship could not be established in Missouri until they had resided there for six months pursuant to the Uniform Child Custody Jurisdiction and Enforcement Act. Mrs. Lanier intends to contact the attorney in October to establish guardianship.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202	Mrs. Lanier therefore requests that the Court postpone the status hearing until after November 15, 2014, and that the California Guardianship remain in full force and effect until guardianship in Missouri can be established.	
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice	Status Report filed 12-31-14 states Ms. Lanier has been approved to receive legal representation through Legal Services of Southern Missouri's Volunteer Lawyer Project to establish a guardianship in the State of Missouri. Attached are notarized consent forms signed by both parents, Kenneth Lanier and Erin Zane.	
		Reviewed by: skc
		Reviewed on: 4-8-15
		Updates:
		Recommendation:
		File 12 – Lanier

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

DOD: 01/13/2013	<p>GLORIA B. LEDOUX, sister, was appointed Administrator with limited IAEA authority without bond on 11/06/2013.</p> <p>Letters issued on 11/06/2013.</p> <p>Inventory and Appraisal filed 11/08/2013 shows an estate valued at \$180,000.00.</p> <p>Minute Order of 11/06/2013 set this matter for hearing for the filing of the First Account and/or Petition for Final Distribution.</p> <p>Status Report filed 04/03/2015 states the estate remains open with the only asset consisting of an undivided one half interest in real property located at 1515 Rose Ave, Selma Ca. The property does not produce income and all expenses are being paid by the Administrator as the owner of the remaining one half interest who resides in the property. The heirs of the estate have all expressed a desire to keep the property in the family and allow the administrator the right to continue to reside at the property.</p> <p>In order to distribute the property in undivided interests, the administrator is working on settling the creditor's claims and expenses of administration outside of the estate assets. Additional time is requested to settle the claims.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 01/09/2015: Counsel requests 90 days. If the petition is filed at least two court days prior to the hearing, then no appearance is necessary on 04/14/2015.</p> <p>1. Need First Account or Petition for Final Distribution.</p>		
Cont. from 010915				
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: LV	
			Reviewed on: 04/09/2015	
			Updates:	
		Recommendation:		
		File 13 - Morales		

Petitioner, Dale Stevens' First Partial Accounting

		<p>DALE STEVENS, as the purported, proper, successor Trustee of the Edith Lillian Mitchell Stevens Revocable Trust, is petitioner.</p> <p>Petitioner states Robert Stevens is indisputably the Trustee of the Sam C. Stevens Revocable Living Trust. Robert Stevens has produced and provided no discovery documents of any kind to present a more complete accounting. Dale Stevens has produced initially 269 pages of source documents, transaction receipts, paid utility statements, and similar source documents to Robert Stevens' attorney in accordance with the Court's most recent order in this case that the Parties engage in a mutual disclosure of documents.</p> <p>Therefore Dale Stevens can only provide this "partial" accounting because Robert Stevens is not observing the current Order of the Court nor administering the Sam C. Stevens Revocable Trust in accordance with the Code.</p> <p>The Petition for Instructions that initiated these proceedings asked for instructions and findings from the Court. The Court has yet to rule upon those three fundamental, foundational facts, which must be decided by Findings of the Court, before any actual attempt at reconciliation between the two Trusts can realistically be envisioned.</p> <p style="text-align: center;">Please see additional page</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 3/17/15. Minute order states Ms. Standard wants the matter set for trial; there is a one day time estimate. Ms. LeVan has just substituted in and needs time. Ms. Standard is to file a Status Report at least two court days prior to 4/14/15. The Court wants written proof of Kingsburg City's commitment to not act on the 940 Mariposa property.</p> <ol style="list-style-type: none"> 1. The accounting does not comply with Probate Code §1060 et seq. 2. Need Notice of Hearing. 3. Need proof of service of the Notice of Hearing on all interested parties. 4. Need Order. 	
Cont. from 010515, 012715, 031715				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			X
<input type="checkbox"/>	Aff.Mail			X
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order			X
<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: 4/9/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 15A - Stevens</p>		

15A Edith Lillian Mitchell Stevens Rev. Liv. Trust Case No. 13CEPR00943

The three fundamental issues (for which Instructions were sought by Petitioner) are set forth in the Petition for Instructions, as follows:

1. An adjudication, Finding, and Instruction from the Court that, under operation [the first paragraph of Section VIII] the Third Trust Amendment Dated February 11, 2008, Petitioner Clarence Dale Stevens is confirmed as the due, proper and only Successor Trustee of THE EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST dated November 2, 1983, as Amended on May 4, 2007, as additionally amended on May 9, 2007, and as further Amended on February 11, 2008.
2. An adjudication, Finding, and Instruction from the Court that the Third Trust Amendment of THE EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST dated November 2, 1983, as Amended on May 4, 2007, as additionally amended on May 9, 2007, and as further Amended on February 11, 2008 is in full force and effect.
3. An adjudication, Finding, and Instruction from the Court that the Third Trust Amendment of the THE EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST dated November 2, 1983, as amended, controls and instructs the Petitioner/Successor Trustee how the Trust Estate contained within THE EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST dated November 2, 1983, as Amended, shall be distributed.

Attached to the Petition is Restated Operating Summaries of all rents received and all debts and expenses paid by the Petitioner, for the years 2012, 2013 and partially into 2014 for the various Trust parcels of real property he has been administering since Edith Stevens died in 2012.

There can be no financial reconciliation between the two Trusts until the Court adjudicates the three foundational issues set forth above.

The Second Amendment to the Trust and the Third Amendment to the Trust changes the distributive shares of the beneficiaries.

Respondent Robert Stevens, submits that the Second and Third Amendments should be declared invalid so that the entire two Trust Estates can be divided equally among the four beneficiaries.

Petitioner Dale Stevens submits that both the Second and Third Trust Amendments should be declared valid and operative – and until that happens, the Parties cannot move forward to resolution of this matter.

Further, Edith executed so many different documents changing the terms of the Trust originally executed, that her intent for disposition of her estate is not clear. Edith also executed a Will, after all of the amendments, which has been purportedly denied by her in an alleged writing created by **CLARENCE DALE STEVENS** after staying with her son Larry. The Will purportedly divided her estate equally between her children again, as was originally contained in the Trust document.

The issue of the validity of any amendments executed by Edith is the primary focus of this proceeding, as well as the validity of a Will executed by Edith after the execution of the purported amendments.

On 11/11/14, the parties appeared for a Mandatory Settlement Conference. The conference was not held due to the fact that **CLARENCE DALE STEVENS** terminated the employment of his attorney Michael Karby and further because after the deposition of **CLARENCE DALE STEVENS** it was determined that additional discovery was necessary. **CLARENCE DALE STEVENS** was given an additional 60 days to obtain new counsel. A hearing was set for status on 1/27/15.

CLARENCE DALE STEVENS has not obtained new legal counsel. **CLARENCE DALE STEVENS** is precluded from acting as his own attorney as he is acting as the Trustee of the **EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST** and claims to be the valid Trustee pursuant to a third amendment to the Trust, executed at a time when **CLARENCE DALE STEVENS** was care giving for Edith and she was suffering dementia.

Objector/Beneficiary, **ROBERT STEVENS** is prepared and ready for trial in this matter. **ROBERT STEVENS** has made several proposals for settlement in this matter, none of which have been agreed to by **CLARENCE DALE STEVENS**.

Accountings have been filed, however, neither party is in a position to prepare full accountings, until there is a determination as to who is the proper Trustee of the **EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST**.

The matter of the validity of the Trust documents and/or her Will needs to be resolved before any further action in this proceeding can occur.

ROBERT STEVENS request this matter be set for trial, with the issue of the validity of the Trust and/or Will of **EDITH LILLIAN MITCHELL STEVENS** being bifurcated from any other issues.

This matter is completely stalled however, as long as **CLARENCE DALE STEVENS** is not represented by legal counsel.

Atty LeVan, Nancy (for Dale Stevens)

Atty Standard, Donna (for Robert Stevens)

Probate Status Hearing RE: Repairs to the Two Properties

		There is a dispute between Dale Stevens and Robert Stevens as to the validity of amendments to the Trust. Please see pages 15A and 15B.	NEEDS/PROBLEMS/COMMENTS:
Conf. from		<p>Minute order dated 3/17/15 set this status hearing re: Repairs to the Two Properties. Ms. Standard is to file a Status Report at least two court days prior to 4/14/15. The Court wants written proof of Kingsburg City's commitment to not act on the 940 Mariposa property.</p>	<p>1. Need current written status report. Minute order dated 3/17/15 required the status report to be filed no later than 2 court days prior to the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 4/9/15
			Updates:
			Recommendation:
			File 15C - Stevens

17A Christian Vang and Jacob Vang (GUARD/P)
 Atty Moua, Cynthia (pro per – maternal grandmother/co-guardian)
 Atty Moua, Terry (pro per – maternal grandfather/co-guardian)
 Atty Moua, Michelle (pro per – mother/objector)
 Atty Vang, Yee (pro per – father/Petitioner)

Case No. 06CEPR00894

Petition for Termination of Guardianship (of Christian Vang, Jacob Vang)

Christian, 5	YEE VANG, father, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Jacob, 4	CYNTHIA MOUA and TERRY MOUA, maternal grandparents, were appointed as co-guardians of Jacob and Christian on 05/03/12. – Cynthia and Terry Moua were served by mail on 03/19/15	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.	Mother: MICHELLE MOUA – served by mail on 03/27/15	
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC	Paternal grandfather: DECEASED Paternal grandmother: NENG LEE – personally served on 03/14/15	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Petitioner states [see Petition for details].	
<input checked="" type="checkbox"/> Aff.Mail	Objection to Termination of Guardianship filed 03/25/15 by Michelle Moua (mother) states: [See file for details].	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv.	Court Investigator Charlotte Bien filed a report on 03/30/15.	
<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 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 type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed on: 04/09/15
		Updates:
		Recommendation:
		File 17A - Vang

17B Noah Vang (GUARD/P)
 Atty Carrasco, Chue Vang (pro per – paternal aunt/co-guardian)
 Atty Carrasco, Octavio (pro per – paternal uncle/co-guardian)
 Atty Moua, Michelle (pro per – mother/objector)
 Atty Vang, Yee (pro per – father/Petitioner)

Case No. 06CEPR00894

Petition for Termination of Guardianship (of Noah Vang)

Noah, Age: 10	YEE VANG , father, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	CHUE CARRASCO and OCTAVIO CARASCO , paternal aunt and uncle, were appointed as co-guardians of Noah Vang on 01/30/12. – Chue & Octavio Carasco were personally served on 03/14/15	
Cont. from	Mother: MICHELLE MOUA – served by mail on 03/27/15	
<input type="checkbox"/> Aff.Sub.Wit.	Paternal grandfather: DECEASED	
<input checked="" type="checkbox"/> Verified	Paternal grandmother: NENG LEE – personally served on 03/14/15	
<input type="checkbox"/> Inventory	Maternal grandfather: TERRY MOUA – served by mail on 03/19/15	
<input type="checkbox"/> PTC	Maternal grandmother: CYNTHIA MOUA – served by mail on 03/19/15	
<input type="checkbox"/> Not.Cred.	Petitioner states [see Petition for details].	
<input checked="" type="checkbox"/> Notice of Hrg	Objection to Termination of Guardianship [see file for details].	
<input checked="" type="checkbox"/> Aff.Mail w/	Court Investigator Charlotte Bien filed a report on 03/30/15.	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv. w/		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 04/09/15
		Updates:
		Recommendation:
		File 17B - Vang

17B

**19 Leeanjdra Herrera, Brijido Frank Herrera, Jr., and
Isaiah Andres Sanchez Almaguer, Jr. (GUARD/P) Case No. 12CEPR00752**

Atty Herrera, Brijido F. (Pro Per – Father of Leeanjdra and Brijido, Jr. – Petitioner)

Atty Sanchez, Leonardo (Pro Per – Maternal Grandfather – Guardian)

Atty Sanchez, Rosalinda S. (Pro Per – Maternal Grandmother – Guardian)

Petition for Visitation

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> This petition pertains to minors Leeanjdra and Brijido, Jr., only.</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing on: <ul style="list-style-type: none"> - Leonardo Sanchez (Guardian) - Rosalinda Sanchez (Guardian) 3. The Court may also require notice to the mother, Rosalinda Soria Sanchez, and other relatives. 	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 4/9/15	
			Updates:	
			Recommendation:	
			File 19 – Herrera & Almaguar	

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing on the guardians and <u>all</u> relatives pursuant to Probate Code §1460(b)(5): - Adam Gonzalez (Guardian and Paternal Grandfather) - Leticia Gonzalez (Guardian and Paternal Grandmother) - Adam Gonzalez, Jr. (Father) - Rosa Angela Mejia (Maternal Grandmother)	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 4/9/15	
			Updates:	
			Recommendation:	
			File 20 - Gonzalez	

Motion to Remove Counsel

	JAMIE S THOMAS , Beneficiary, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Petitioner moves the Court for an order removing MICHAEL A. MILNES as counsel from this action.	
Aff.Sub.Wit.	Petitioner states she has tried numerous times to contact Mr. Milnes by phone, and he does not answer or return her calls. He has made himself unavailable to sign a substitution of attorney. Petitioner requests the removal of Mr. Milnes so that she may obtain new counsel. She cannot obtain new counsel until the Court has approved the removal of Mr. Milnes. Attached declaration states Mr. Milnes has failed to provide Petitioner with effective assistance. She has requested documents and information on hearings, but does not receive information. Mr. Milnes provides court documents for signature with a deadline for filing in an untimely manner. Petitioner has also become aware that Mr. Milnes license has been suspended and he should not even be practicing. Proof of Service by Mail indicates service of this motion on Michael Milnes on 3/3/15.	
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		Reviewed by: skc Reviewed on: 4-9-15 Updates: Recommendation: File 21 - Hamilton
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Amended Petition for Probate of Will and for Letters Testamentary

DOD: 10-16-14	DEBORA A. CAVANAUGH , Daughter and named alternate executor without bond, is Petitioner.		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 3-10-15</p> <p>Note: If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> • Tuesday, Sept. 15, 2015 for the filing of the Inventory and Appraisal • Tuesday, July 12, 2016 for the filing of the first account or petition for final distribution. <p>If the proper items are on file prior to the status hearing dates pursuant to Local Rule 7.5.C., then the status hearings may be taken off calendar. Otherwise, written status report and appearance is required.</p>
	Full IAEA: ok		
	Will dated 11-17-94		
Cont from 031015	Residence: Kerman, CA Publication: Fresno Bee		
<input type="checkbox"/> Aff.Sub.Wit.	S/P	Estimated value of estate:	
<input checked="" type="checkbox"/> Verified		Personal property: \$ 3,000.00	
<input type="checkbox"/> Inventory		Real property: \$158,000.00	
<input type="checkbox"/> PTC		Total: \$161,000.00	
<input type="checkbox"/> Not.Cred.		Probate Referee: Rick Smith	
<input checked="" type="checkbox"/> Notice of Hrg		TERRY BREWER, Son, filed an objection on 12-29-14 in response to the prior petition for probate filed 11-26-14.	
<input checked="" type="checkbox"/> Aff.Mail	w	Petitioner responded to the objection in an attachment to this amended petition.	
<input checked="" type="checkbox"/> Aff.Pub.		See Page 2.	
<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 checked="" 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: 4-8-15
			Updates:
			Recommendation:
			File 22 - Brewer

Page 2

Objector states the decedent died without a will or trust. The will attached is their father's will. Objector objects to Petitioner Debora A. Cavanaugh and his brother Donnie Brewer being appointed administrator and states he wishes to be appointed administrator. Objector states his brother Donnie stole at least \$65,000 from their mother and later moved into her house, where he still resides. Objector states Petitioner and Donnie are not trustworthy and would not fulfill their administrative and fiduciary duty to fairly administer and distribute the assets of the estate. Please see objection for additional allegations including fraud and elder abuse, and proposed estate management and distribution.

Petitioner includes a response to the objection in this amended petition. Petitioner states she located her mother's will after contacting the lawyer that completed her father's will. Both have been deposited, and the will of Emma JoAnn Brewer is attached to this amended petition. The will nominates Petitioner as executrix. Petitioner would like to know if Terry is contesting the will now that it has been found.

Petitioner states her mother was aware of the loan on the house; that she did take a loan on her house and loaned it to Donnie to buy a house. He was hoping to pay it off before they found out about it, but then lost his job. Petitioner states this was a loan, and he did not steal it. Their mother had the right to do whatever she wanted with her money when she was alive. She could have spent all her equity vacationing in Hawaii. She was not in bad shape with dementia until July 2011. In 2010, Petitioner, Donnie, and their mother went to a lawyer for power of attorney and health care directive. Petitioner was primary, Donnie was secondary. Donnie and his wife Sharon cared for their mother. See description of situation in petition and further description of estimated assets.

Objector filed Supplemental Declaration on 3-9-15. Objector states in light of the alleged "new" will, and in response to statements previously made by Petitioner, Objector submits additional information and respectfully requests a full accounting of bank records which will show the theft of estate property and funds by Donnie Brewer with the acquiescence of Debora Cavanaugh.

Examiner's Note re Objector's supplemental declaration: *The matter presently before the Court is Debora A. Cavanaugh's petition for appointment as personal representative, and admission of the decedent's will to probate. It is unclear if Objector intends this to be a will contest pursuant to Probate Code §8250; however, if so, no summons has been issued. Note that issues that occurred prior to the decedent's death or causes of action of fraud, financial elder abuse, etc., do not fall under the Probate Code and may need to be addressed in the civil court.*

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

Age: 27	<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS:
	DENISE GARDINER, mother, is Petitioner and requests appointment of Conservator of the Person.	Court Investigator advised rights on 01/14/15.
	Voting rights affected.	Voting rights affected, need minute order.
Cont. from 012715	Petitioner states [see petition for details].	<u>CONTINUED FROM 01/27/15</u>
Aff.Sub.Wit.	Court Investigator Jennifer Daniel filed a report on 01/21/15.	As of 04/08/15, nothing further has been filed and the following notes remain:
✓ Verified		1. Need Notice of Hearing.
Inventory		2. Need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Probate Conservator for:
PTC		a. John Gardiner (father)
Not.Cred.		b. Tarik Tucker (brother)
Notice of Hrg		c. John Gardiner, III (brother)
Aff.Mail		d. Savannah Gardiner (sister)
Aff.Pub.		e. Stella Washington (grandmother)
Sp.Ntc.		3. Need Citation and proof of personal service of Citation with a copy of the Petition for Appointment of Probate Conservator at least 15 days before the hearing for Brianna Gardiner (proposed conservatee).
Pers.Serv.		4. Need Confidential Conservator Screening Form.
Conf. Screen		5. Need Receipt for watching conservatorship video.
✓ Letters		Reviewed by: JF
✓ Duties/Supp		Reviewed on: 04/08/15
Objections		Updates:
Video Receipt		Recommendation:
✓ CI Report		File 23 - Gardiner
9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

Age: 28	<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS:
	DENISE GARDINER, mother, is Petitioner and requests appointment of Conservator of the Person.	Court Investigator advised rights on 01/14/15.
	Voting rights affected.	Voting rights affected, need minute order.
Cont. from 012715	Petitioner states [see Petition for details].	<u>CONTINUED FROM 01/27/15</u> As of 04/08/15, nothing further has been filed and the following notes remain:
<input type="checkbox"/> Aff.Sub.Wit.		6. Need Notice of Hearing.
<input checked="" type="checkbox"/> Verified		7. Need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Probate Conservator for:
<input type="checkbox"/> Inventory		f. John Gardiner (father)
<input type="checkbox"/> PTC		g. Tarik Tucker (brother)
<input type="checkbox"/> Not.Cred.		h. Brianna Gardiner (sister)
<input type="checkbox"/> Notice of Hrg	Court Investigator Jennifer Daniel filed a report on 01/21/15.	i. Savannah Gardiner (sister)
<input type="checkbox"/> Aff.Mail		j. Stella Washington (grandmother)
<input type="checkbox"/> Aff.Pub.		8. Need Citation and proof of personal service of Citation with a copy of the Petition for Appointment of Probate Conservator at least 15 days before the hearing for John Gardiner, III (proposed conservatee).
<input type="checkbox"/> Sp.Ntc.		9. Need Confidential Conservator Screening Form.
<input type="checkbox"/> Pers.Serv.		10. Need Duties of Conservator. Note: Duties filed 12/12/14 are incomplete, the first page is the Duties form, but all subsequent pages are a copy of the Petition for Probate Conservator.
<input type="checkbox"/> Conf. Screen		11. Need Receipt for watching conservatorship video.
<input checked="" type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		Reviewed by: JF
<input type="checkbox"/> Objections		Reviewed on: 04/08/15
<input type="checkbox"/> Video Receipt		Updates:
<input checked="" type="checkbox"/> CI Report		Recommendation:
<input type="checkbox"/> 9202		File 24 - Gardiner
<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		

Amended Petition to Determine Succession to Real Property

DOD: 10-16-14		<p>JOE DEE KILGORE and RHETT STEVEN KILGORE are Petitioners.</p> <p>40 days since DOD</p> <p>No other proceedings</p> <p>I&A: \$144,953.07 (real property located at 3704 W. Persimmon Lane)</p> <p>Decedent died intestate</p> <p>Petitioners request Court determination that the decedent's 100% separate property interest in the real property passes to them one-half each.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cont from 031015			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" 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 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: 4-8-15	
		Updates:	
		Recommendation: SUBMITTED	
		File 25 - Kilgore	

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

DOD: 5/11/14		<p>MARINA REESE, spouse, and STEVEN ALLEN KLISE, NORMA DEPOYAN, HAZEL MARIE STEITZ and TIMOTHY JON KLISE, siblings, are petitioners.</p> <p>40 days since DOD.</p> <p>No other proceedings.</p> <p>Decedent died intestate.</p> <p>I & A - \$75,000.00</p> <p>Petitioners request Court determination that Decedent's 100% interest in real property pass to MARINA REESE pursuant to intestate succession and assignments of interest.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. The siblings of the decedent have assigned their interest in this estate to the surviving spouse. There does not appear to be a provision in the Probate Code that would allow an individual to assign their interest in the estate in a summary proceeding. 2. Attachment 14 lists Kenneth Edward Reese. It appears that Kenneth is another sibling of the decedent. Kenneth died on 6/7/1985. Petition does not indicate whether or not Kenneth was survived by issue. If Kenneth was survived by issue, his issue would also be entitled to a portion of the decedent's real property. Probate Code §6401. 	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			W/
<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: 4/9/15		
		Updates:		
		Recommendation:		
		File 26 - Reese		

- Atty Mascorro, Mary (Pro Per Petitioner)
- Atty Romuar, Irma (Pro Per Petitioner)
- Atty Gonzalez, Jose A. (Pro Per Petitioner)
- Atty Gonzalez, Lupe (Pro Per Petitioner)
- Atty Gonzalez, Andres (Pro Per Petitioner)
- Atty Henderson, Juanita (Pro Per Petitioner)
- Atty Gonzalez, Herbert (Pro Per Petitioner)
- Atty Sugai, Vinnie (Pro Per Petitioner)
- Atty Gonzalez, Jesse (Pro Per Petitioner)
- Atty Gonzalez, Martin (Pro Per Petitioner)

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

DOD: 6/25/14	MARY MASCORRO, IRMA ROMUAR, JOSE A. GONZALEZ, LUPE GONZALEZ, ANDRES GONZALEZ, JUANITA HENDERSON, HERBERT GONZALEZ, VINNIE SUGAI, JESSE GONZALEZ, and MARTIN GONZALEZ , all adult children of the decedent, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:
		1. Need date of death of the decedent's deceased spouse pursuant to Local Rule 7.1.1.D.
		2. Need completed proposed Order (Form DE-315), including legal description of real property. Remember that a signature line for the judge should appear after any attachments (on the same page) pursuant to Local Rules 7.1.1.F. and 7.6.1.B.
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory	40 days since DOD	
<input type="checkbox"/> PTC	No other proceedings	
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	I&A: \$80,000.00 (Real property in Reedley, CA)	
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.	Decedent died intestate	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Petitioners request Court determination that the decedent's 100% interest in certain real property in Reedley, CA, passes to them in 1/10 undivided interests each.	
<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	x	
<input type="checkbox"/> Aff. Posting		Reviewed by: skc
<input type="checkbox"/> Status Rpt		Reviewed on: 4/9/15
<input type="checkbox"/> UCCJEA		Updates:
<input type="checkbox"/> Citation		Recommendation:
<input type="checkbox"/> FTB Notice		File 27 - Gonzalez

Status Hearing Re: Filing of the Eighteenth Account and Report of Trustees

		MICHAEL PAPPACODA and JOYCE THOMAS are the current Trustees.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Eighteenth Account or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>	
		Seventeenth Account and Report was approved on 5/1/14.		
Cont. from 032415		Seventeenth account covered the period from 1/1/13 through 12/31/13.		
	Aff.Sub.Wit.			
✓	Verified			
	Inventory	Property on hand at the end of the Seventeenth account was \$184,000.55.		
	PTC			
	Not.Cred.			
	Notice of Hrg	Minute Order dated 5/1/14 set this status hearing for the filing of the 18 th account.		
	Aff.Mail			
	Aff.Pub.	Former Status Report filed on 3/19/15 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.		
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections	On 3/18/15 Mr. Knudson states he received the account and supplemental materials from Mr. Eberwein to enable preparation of the petition.		
	Video Receipt			
	CI Report			
	9202 Order	Mr. Knudson and his staff are diligently working to complete the petition and account; however, it is unclear whether it will be completed, reviewed by the trustees and ready to be filed prior to the status hearing.		
	Aff. Posting Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice	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.		
				Reviewed by: KT
				Reviewed on: 4/9/15
				Updates:
			Recommendation:	
			File 28 - Goering	

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

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: 1. <u>As previously noted:</u> This minor is a ward of the Juvenile Delinquency Court. Therefore, this Probate Court does not have jurisdiction to grant a temporary or general guardianship for this minor. Petitioner may wish to pursue placement in the proper Court. <u>If this petition goes forward, the following issues exist:</u> 2. Need Child Information Attachment (GC-210CA). 3. Need Notice of Hearing. 4. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) on: - Mother (Name not provided) 5. Notice to the minor's juvenile probation officer / County of Fresno may also be required.	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
	Letters			X
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order	X		
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 4-9-15	
			Updates:	
			Recommendation:	
			File 29 - Byrd	

Petition for Appointment of Temporary Guardian of the Person

See petition for details			NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 2. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing pursuant to Probate Code §2250(e) on: - Alvaro Gomez Martinez (Father) - Liliana Martinez Mendieta (Mother)
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	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: 4/9/15
			Updates:
			Recommendation:
			File 30 - Gomez