



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.

1A Sharon Elaine Bess (CONS/P)

Case No. 0241225

Attorney Kruthers, Heather K. (for Public Guardian)

Conservator Christian, Elsie J. (Pro Per)

Probate Status Hearing Re: Possible Removal of Conservator

| | | | | |
|---|--|--|--|--|
| | <p>ELSIE J. CHRISTIAN, sister, was appointed Successor Conservator of the Person, with medical consent powers on 12/19/2014.</p> <p>Letters issued on 12/23/2014.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1B is the Petition for Successor Conservator filed by Marvin Bland, brother.</p> <p>Minute Order of 01/25/2016: Matter is continued to meet up with the petition for appointment of a successor conservator.</p> | | |
| <p>Cont. from 012516, 022916</p> | <p><u>Please see petition for details</u></p> | <p>Reviewed by: LV</p> <p>Reviewed on: 04/11/2016</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1A- Bess</p> | | |
| <table border="1"> <tr> <td>Aff.Sub.Wit.</td> <td></td> </tr> </table> | Aff.Sub.Wit. | | | |
| Aff.Sub.Wit. | | | | |
| <table border="1"> <tr> <td>Verified</td> <td></td> </tr> </table> | Verified | | | |
| Verified | | | | |
| <table border="1"> <tr> <td>Inventory</td> <td></td> </tr> </table> | Inventory | | | |
| Inventory | | | | |
| <table border="1"> <tr> <td>PTC</td> <td></td> </tr> </table> | PTC | | | |
| PTC | | | | |
| <table border="1"> <tr> <td>Not.Cred.</td> <td></td> </tr> </table> | Not.Cred. | | | |
| Not.Cred. | | | | |
| <table border="1"> <tr> <td>Notice of Hrg</td> <td></td> </tr> </table> | Notice of Hrg | | | |
| Notice of Hrg | | | | |
| <table border="1"> <tr> <td>Aff.Mail</td> <td></td> </tr> </table> | Aff.Mail | | | |
| Aff.Mail | | | | |
| <table border="1"> <tr> <td>Aff.Pub.</td> <td></td> </tr> </table> | Aff.Pub. | | | |
| Aff.Pub. | | | | |
| <table border="1"> <tr> <td>Sp.Ntc.</td> <td></td> </tr> </table> | Sp.Ntc. | | | |
| Sp.Ntc. | | | | |
| <table border="1"> <tr> <td>Pers.Serv.</td> <td></td> </tr> </table> | Pers.Serv. | | | |
| Pers.Serv. | | | | |
| <table border="1"> <tr> <td>Conf. Screen</td> <td></td> </tr> </table> | Conf. Screen | | | |
| Conf. Screen | | | | |
| <table border="1"> <tr> <td>Letters</td> <td></td> </tr> </table> | Letters | | | |
| Letters | | | | |
| <table border="1"> <tr> <td>Duties/Supp</td> <td></td> </tr> </table> | Duties/Supp | | | |
| Duties/Supp | | | | |
| <table border="1"> <tr> <td>Objections</td> <td></td> </tr> </table> | Objections | | | |
| Objections | | | | |
| <table border="1"> <tr> <td>Video Receipt</td> <td></td> </tr> </table> | Video Receipt | | | |
| Video Receipt | | | | |
| <table border="1"> <tr> <td>CI Report</td> <td></td> </tr> </table> | CI Report | | | |
| CI Report | | | | |
| <table border="1"> <tr> <td>9202</td> <td></td> </tr> </table> | 9202 | | | |
| 9202 | | | | |
| <table border="1"> <tr> <td>Order</td> <td></td> </tr> </table> | Order | | | |
| Order | | | | |
| <table border="1"> <tr> <td>Aff. Posting</td> <td></td> </tr> </table> | Aff. Posting | | | |
| Aff. Posting | | | | |
| <table border="1"> <tr> <td>Status Rpt</td> <td></td> </tr> </table> | Status Rpt | | | |
| Status Rpt | | | | |
| <table border="1"> <tr> <td>UCCJEA</td> <td></td> </tr> </table> | UCCJEA | | | |
| UCCJEA | | | | |
| <table border="1"> <tr> <td>Citation</td> <td></td> </tr> </table> | Citation | | | |
| Citation | | | | |
| <table border="1"> <tr> <td>FTB Notice</td> <td></td> </tr> </table> | FTB Notice | | | |
| FTB Notice | | | | |

1A

2 Maria Elana Lopez (CONS/PE) Case No. 0646777

Attorney Kruthers, Heather H (for Public Guardian)

Probate Status Hearing Re: Next Account

| | | |
|--------------------------|---|--|
| | PUBLIC GUARDIAN , was appointed is Conservator of the Person and Estate on 07/20/2000. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 01/14/2016: Counsel requests 90 days.</p> <p>1. Need Fourteenth Account.</p> |
| | Letters issued on 07/20/2000. | |
| Cont. from 011416 | Order Settling the Thirteenth Account and Report of Conservator was filed on 01/29/2015. Property on hand at the end of the Thirteenth Account is \$1,344,279.84. | |
| Aff.Sub.Wit. | | |
| Verified | | |
| Inventory | | |
| PTC | | |
| Not.Cred. | | |
| Notice of Hrg | Minute Order of 01/29/2015 set this Status Hearing for the filing of the next account. | |
| 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>Reviewed by: LV</p> <p>Reviewed on: 04/11/2016</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 2- Lopez</p> |

Report of Sale and Petition for Order Confirming Sale of Real Property

| | | | |
|-------------------------------------|----------------------|--|--|
| | | JOSEPH KALASHIAN , Conservator, is Petitioner. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> Order Authorizing Sale of Former Residence of Conservatee was entered on 5/13/15.</p> |
| | | Sale price: \$282,500.00 Overbid: \$297,125.00 | |
| | | Reappraisal: \$290,000.00 | |
| <input type="checkbox"/> | Aff.Sub.Wit. | Property: 780 W. San Ramon, Fresno | |
| <input checked="" type="checkbox"/> | Verified | Publication: Business Journal | |
| <input type="checkbox"/> | Inventory | Buyers: Howard W. Underwood and Roberta J. Underwood, husband and wife, as joint tenants | |
| <input type="checkbox"/> | PTC | Broker: 6% or \$16,950.00 (\$8,475.00 each to Sylvia Kalashian of Guarantee Real Estate and Brooks Boyer of London Properties) (Relationship disclosure: Sylvia Kalashian is the widow of the conservator's deceased cousin.) | |
| <input type="checkbox"/> | Not.Cred. | Bond: Current bond is \$135,603.98. Estimated net proceeds of the sale will be \$259,900.00. Including assets on hand, income, net proceeds, and cost of recovery, Petitioner requests bond be increased to \$367,429.18, or an additional bond of \$231,825.20. | |
| <input checked="" type="checkbox"/> | Notice of Hrg | Terms of sale: As is, seller to pay for various inspections, title insurance, etc., half of warranty. See Attachment 4f. | |
| <input checked="" type="checkbox"/> | Aff.Mail | | |
| <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 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 checked="" 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: 4/11/16 |
| | | | Updates: |
| | | | Recommendation: |
| | | | File 3- Kalashian |

4 Alexxia E. Valdez & Sofia J. Valdez (GUARD/P) Case No. 12CEPR00284

Petitioner Valdez, Yolanda (Pro Per – Maternal Grandmother)

Petition for Appointment of Guardian of the Person

| | | | |
|---------------------------|---------------|--|--|
| | | <u>TEMPORARY EXPIRES 04/14/2016</u> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 01/21/2016: The Court dispenses with notice as to the unknown father and unknown paternal grandparents of Sofia. Petitioner represents that the paternal grandfather of Alexxia is Noe Leon, Sr. matter is continued for proof of service.</p> |
| | | YOLANDA VALDEZ, maternal grandmother, is Petitioner. | |
| | | <u>Please see petition for details</u> | |
| Cont. from 012116, 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: LV |
| | | | Reviewed on: 04/11/2016 |
| | | | Updates: |
| | | | Recommendation: |
| | | | File 4- Valdez |

Attorney Lisa Horton (for Petitioner Meredith McNeil)

Probate Status Hearing Re: Informal Accounting for Closing Reserve

| | | |
|----------------------------------|--|--|
| DOD: 4/12/2013 | <p>MEREDITH McNEIL, daughter, was appointed Executor on 8/26/2013, and Letters issued on that date.</p> <p><i>Order Settling the First and Final Account and Report of Executrix, etc., filed 6/25/2015</i> authorized a closing reserve of \$10,000.00, finding that a status hearing shall be set for an informal accounting of the reserve.</p> <p><i>Notice of Calendar Setting filed 12/31/2015</i> set the status hearing for informal accounting of closing reserve on 2/4/2016.</p> | NEEDS/PROBLEMS/COMMENTS: |
| | | OFF CALENDAR |
| | | <i>Declaration of Counsel Re: Informal Reserve Accounting and Distribution of Reserve Funds filed 4/11/2016.</i> |
| Cont. from 020416, 031016 | | |
| 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: LEG |
| | | Reviewed on: 4/11/16 |
| | | Updates: |
| | | Recommendation: |
| | | File 5-McNeil |

Petition for Settlement of First and Final Account; For Payment of Administrative Expenses; Petition for Final Distribution; and for Allowance of Compensation for Ordinary and Extraordinary Services

| | | |
|--|--|---------------------------------|
| DOD: 1/13/13 | GLORIA B. LE DOUX , Administrator, is petitioner. | NEEDS/PROBLEMS/COMMENTS: |
| | Account period: 11/6/13 – 2/24/16 | |
| Cont. from | Accounting - \$180,000.00 | |
| <input type="checkbox"/> Aff.Sub.Wit. | Beginning POH - \$180,000.00 | |
| <input checked="" type="checkbox"/> Verified | Ending POH - \$133,908.16 | |
| <input checked="" type="checkbox"/> Inventory | Administrator - \$5,320.00 | |
| <input checked="" type="checkbox"/> PTC | (statutory) | |
| <input checked="" type="checkbox"/> Not.Cred. | Administrator x/o - \$1,000.00 (per Local Rule for court confirmed sale of real property. | |
| <input checked="" type="checkbox"/> Notice of Hrg | Attorney - \$5,320.00 | |
| <input checked="" type="checkbox"/> Aff.Mail W/ | (statutory) | |
| Aff.Pub. | Attorney x/o - \$1,000.00 (per Local Rule for court confirmed sale of real property. | |
| Sp.Ntc. | | |
| Pers.Serv. | | |
| Conf. Screen | Costs - \$2,369.00 (filing fees, publication, probate referee, certified copies) | |
| <input checked="" type="checkbox"/> Letters 11/6/13 | | |
| Duties/Supp | | |
| Objections | Creditor's Claims - \$6,463.69 | |
| Video Receipt | (\$1,839.28 – First National Bank; \$4,624.41 – American Express) | |
| CI Report | | |
| <input checked="" type="checkbox"/> 9202 | Closing - \$1,000.00 | |
| <input checked="" type="checkbox"/> Order | Distribution, pursuant to intestate succession and assignments of interest, is to: | |
| Aff. Posting | | |
| Status Rpt | Gloria Le Doux - \$41,788.29 | |
| UCCJEA | | |
| Citation | Raul Morales, Gilbert Morales, Lupe Moreno and Manuel Sanchez - \$13,929.43 | |
| <input checked="" type="checkbox"/> FTB Notice | Mona Sanchez, Russell Holeman and Daniel Holeman - \$4,643.15 | |
| | | Reviewed by: KT |
| | | Reviewed on: 4/11/16 |
| | | Updates: |
| | | Recommendation: |
| | | File 6- Morales |

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

| | | |
|--|---|---|
| DOD: 07/24/11 | <p>PAT DESANTIS, friend, was appointed Administrator with Limited IAEA and without bond on 06/06/14. Letters of Administration were issued on 06/20/14.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 5/1/15, 6/11/15, 9/24/15, 1/7/16.</p> <p>1. Need First Account or Petition for Final Distribution or current written status report per Local Rule 7.5.</p> |
| | | |
| | <p>Amended Final I&A was filed 11/6/14</p> | |
| Cont. from 050115, 061115, 092415, 010716 | <p>Status Report filed 12/14/15 states: The estate tax return was filed 08/31/15 without payment so that penalties for late filing of the return would cease. The amount needed to pay the taxes, along with penalties, \$81,812.00, was received via wire transfer by the law office of Quinlan, Kershaw and Fanucchi on 12/07/15 and the money was deposited with the IRS on that date. The accounting firm of Slater Moffat Associates, LLP who prepared the return states that the IRS will place a 6 week hold on the funds while the IRS considers the possibility of an abatement of the late penalties accrued.</p> | |
| Aff.Sub.Wit. | <p>Petitioner has not been released from personal liability for the federal estate tax under IRC § 2204. The return has not been audited and a closing letter has not been issued by the IRS. The two heirs at law are the surviving daughters of the decedent who are non-resident, non-citizen beneficiaries. The executor is currently talking with the CPA to discuss the manner of distribution to the heirs and what tax consequences will be imposed under different methods of distribution, and has begun the process of applying for social security numbers for the beneficiaries. A 90 day continuance is requested to allow for tax issues to be resolved, for petitioner to be released by the IRS, and for the application of the heirs for social security numbers.</p> | |
| 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>Reviewed by: JF/skc</p> <p>Reviewed on: 4/11/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7 – Di Donna</p> |

First Account Current and Report of Conservator: Petition for Allowance of Attorney's Fees; and for Reimbursement of Costs to Attorney

| | | | |
|-------------------------------------|----------------------|--|--|
| | | DEBORAH TITUS , Conservator, is petitioner. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service of the Notice of Hearing on: <ol style="list-style-type: none"> a. Florence Dolby (conservatee) b. Ruth Lind (attorney for conservatee) <p>Note: Judge Kazanjian reserved the issue of attorney fees in the amount of \$1,842.50 for the Petition to Establish a Pooled Special Needs Trust to this hearing date. If the court rules in favor of the additional fees then order will need to be revised.</p> <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Wednesday, February 7, 2018 at 9:00 a.m. in Department 303, for the filing of the second account. <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> |
| | | Account period: 8/21/14 – 11/25/15 | |
| Cont. from | | Accounting - \$74,472.28 | |
| <input type="checkbox"/> | Aff.Sub.Wit. | Beginning POH - \$50,380.63 | |
| <input checked="" type="checkbox"/> | Verified | Ending POH - \$43,709.72 | |
| <input type="checkbox"/> | Inventory | Bond - \$20,000.00 (is sufficient) | |
| <input type="checkbox"/> | PTC | | |
| <input type="checkbox"/> | Not.Cred. | | |
| <input type="checkbox"/> | Notice of Hrg | Conservator - waives | |
| <input type="checkbox"/> | Aff.Mail | Attorney - \$9,487.50 (34.50 hours @ \$275.00 per hour for appt. of conservator, bond, I &A, sale of real property and accounting) | |
| <input type="checkbox"/> | Aff.Pub. | | |
| <input type="checkbox"/> | Sp.Ntc. | | |
| <input type="checkbox"/> | Pers.Serv. | | |
| <input type="checkbox"/> | Conf. Screen | Costs - \$166.00 (\$2,443.50 for filing fees, certified copies, probate referee, publication. \$2,277.50 has been paid by the conservator) | |
| <input type="checkbox"/> | Letters | | |
| <input type="checkbox"/> | Duties/Supp | | |
| <input type="checkbox"/> | Objections | | |
| <input type="checkbox"/> | Video Receipt | Petitioner prays for an Order: | |
| <input type="checkbox"/> | CI Report | 1. Approving, allowing and settling the first account of conservator and approving the acts of Petitioner as Conservator; | |
| <input checked="" type="checkbox"/> | 2620(c) | | |
| <input checked="" type="checkbox"/> | Order | 2. Authorizing payment of attorney fees in the sum of \$9,487.00 and costs of \$166.00 | |
| <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: 4/11/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 10B- Dolby</p> |

Probate Status Hearing RE: Filing of the Inventory and Appraisal and Report from the Public Guardian as to the Surcharge Issue

| | | |
|----------------------|---|--|
| | MARTHA JACKSON , Daughter, was appointed Conservator of the Estate only, without bond and all funds to be placed in a blocked account, on 06/30/2015. Letters issued on 07/02/2015. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Inventory and Appraisal and Report from the Public Guardian as to the Surcharge Issue 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> |
| | | |
| | | |
| | | |
| | | |
| Cont. from | | |
| Aff.Sub.Wit. | Ms. Jackson was removed as Conservator of the Estate and the Public Guardian was appointed per minute order of 01/14//2016. | |
| Verified | | |
| Inventory | | |
| PTC | | |
| Not.Cred. | Letters issued on 01/26/2016. | |
| Notice of Hrg | Minute Order of 01/14/2016 set this Status Hearing re: Filing of the Inventory and Appraisal and Report form the Public Guardian as to the Surcharge Issue. | |
| Aff.Mail | | |
| Aff.Pub. | | |
| Sp.Ntc. | | |
| Pers.Serv. | Minute Order states: The court orders Martha Jackson removed as Conservator of the Estate forthwith and appoints the Public Guardian of the Estate. Letters issued forthwith from this Minute Order. The Public Guardian is to report to the Court as to whether or no surcharge of Ms. Jackson is necessary. Ms. Jackson is admonished to contact Ms. Kruthers and provide all pertinent information. | |
| 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: 04/11/2016 |
| | | Updates: |
| | | Recommendation: |
| | | File 9- Conde |

Attorney Duggan, Mark (Pro Per Petitioner)
 Attorney Pimentel, Paul J. (for Respondent Daniel J. Duggan)

**Petition for Findings and Orders to Compel an Accounting or Provide Information on the Trust:
 Confirm the Creation and Funding of Trust B; and Instructions on Validity of Trust Amendment**

| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---------------|--------------|--|---|----------|--|--|-----------|--|--|-----|--|--|-----------|--|---|---------------|--|---|----------|---|--|----------|--|--|---------|--|--|------------|--|--|--------------|--|--|---------|--|--|-------------|--|--|------------|--|--|---------------|--|--|-----------|--|--|------|--|--|-------|---|--|--------------|--|--|------------|--|--|--------|--|--|----------|--|--|------------|--|---|--|
| <p>Virginia L. Duggan DOD: 4/17/12</p> <hr/> <hr/> <hr/> <p>Cont. from 050515, 070715, 081115, 092915, 111015, 010716, 031016</p> <table border="1" style="width: 100%;"> <tr> <td style="width: 5%;"></td> <td style="width: 85%;">Aff.Sub.Wit.</td> <td style="width: 10%;"></td> </tr> <tr> <td>✓</td> <td>Verified</td> <td></td> </tr> <tr> <td></td> <td>Inventory</td> <td></td> </tr> <tr> <td></td> <td>PTC</td> <td></td> </tr> <tr> <td></td> <td>Not.Cred.</td> <td></td> </tr> <tr> <td>✓</td> <td>Notice of Hrg</td> <td></td> </tr> <tr> <td>✓</td> <td>Aff.Mail</td> <td>w</td> </tr> <tr> <td></td> <td>Aff.Pub.</td> <td></td> </tr> <tr> <td></td> <td>Sp.Ntc.</td> <td></td> </tr> <tr> <td></td> <td>Pers.Serv.</td> <td></td> </tr> <tr> <td></td> <td>Conf. Screen</td> <td></td> </tr> <tr> <td></td> <td>Letters</td> <td></td> </tr> <tr> <td></td> <td>Duties/Supp</td> <td></td> </tr> <tr> <td></td> <td>Objections</td> <td></td> </tr> <tr> <td></td> <td>Video Receipt</td> <td></td> </tr> <tr> <td></td> <td>CI Report</td> <td></td> </tr> <tr> <td></td> <td>9202</td> <td></td> </tr> <tr> <td></td> <td>Order</td> <td>x</td> </tr> <tr> <td></td> <td>Aff. Posting</td> <td></td> </tr> <tr> <td></td> <td>Status Rpt</td> <td></td> </tr> <tr> <td></td> <td>UCCJEA</td> <td></td> </tr> <tr> <td></td> <td>Citation</td> <td></td> </tr> <tr> <td></td> <td>FTB Notice</td> <td></td> </tr> </table> | | 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>MARK DUGGAN, Remainder Beneficiary of Trust B, the irrevocable trust created under the Daniel J. Duggan and Virginia L. Duggan Revocable Living Trust dated 5/31/11, is Petitioner.</p> <p>Petitioner seeks findings and orders to compel an accounting and provide information on the Trust B, confirm the creation and funding of Trust B, and that a trust amendment dated 6/29/12 (after the death of Settlor Virginia L. Duggan) applies only to Trust A.</p> <p>Petitioner states Daniel and Virginia, husband and wife, executed the Daniel J. Duggan and Virginia L. Duggan Revocable Living Trust on 5/31/11. Virginia is Petitioner's mother. Daniel is Petitioner's adopted father. The trust provides that if either co-trustee should resign, become incapacitated, or die then the surviving trustee would become the sole trustee. Further, the trust provides that upon the death of one of the trustors, the trust was to be split into revocable Trust A and irrevocable Trust B, which was designated to hold the portion of the trust estate not allocated to revocable Trust A, portions from revocable trust A added upon the death of the surviving trustor, and other additions.</p> <p>Virginia passed away 4/17/12. Over a year has passed since Virginia's death and Mark still has not received any information on his beneficial share of Trust B. Mark sent Daniel emails and letters requesting information and accounting, which went unanswered for some time. On 8/8/14, by and through his attorneys, Mark sent a letter to Daniel's attorney requesting, among other things, copies of the trust, amendments, and a full, complete, and accurate accounting that complies with Probate Code §§ 16063 and 1060 from 4/17/12 to the present date. The letter also stated that Mark agreed to Daniel's proposed allocation of real properties to Trust B.</p> <p style="text-align: center;">SEE ADDITIONAL PAGES</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 3/10/16:</u> The Court orders Kevin Yee to file a substitution of attorney form forthwith.</p> <p><u>Note:</u> As of 4/8/16, no substitution has been filed.</p> <p><u>Minute Order 1/7/16:</u> Mr. Pimentel agrees to file an accounting as requested. (See Page B.)</p> <p>The following issues remain noted for reference:</p> <ol style="list-style-type: none"> 1. The Court may require notice to Therese Tiab, the second named successor trustee, pursuant to Probate Code §17203. 2. Need proposed order pursuant to Local Rule 7.1.1.F. <hr/> <p>Reviewed by: skc</p> <hr/> <p>Reviewed on: 4/8/16</p> <hr/> <p>Updates:</p> <hr/> <p>Recommendation: File 10A - Duggan</p> |
| | Aff.Sub.Wit. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ✓ | Verified | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Inventory | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | PTC | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Not.Cred. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ✓ | Notice of Hrg | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ✓ | Aff.Mail | w | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Aff.Pub. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Sp.Ntc. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Pers.Serv. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Conf. Screen | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Letters | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Duties/Supp | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Objections | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Video Receipt | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | CI Report | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 9202 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Order | x | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Aff. Posting | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Status Rpt | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | UCCJEA | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Citation | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | FTB Notice | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Petitioner states (Cont'd): Mark requested that Daniel record the deeds of the assets allocated to reflect that the assets were a part of Trust B and execute a promissory note for \$125,000.00 with Trust B as the holder and Trust A as the maker of the note. Properties include:

1. 6022 North Marty Ave., APN 106-362-06S
2. 1697 East Los Altos, APN 408-253-13
3. 6750 North Millbrook, APN 408-281-07
4. 2020 South Mary, APNs 468-341-03 and 04
5. 2003-2009 South Sarah, APNs 468-341-14 and 18

On 8/12/14, counsel for Daniel sent a letter that stated he would forward the request to Daniel and provide information as requested. On 8/15/14, Counsel for Daniel mailed the Notification by Trustee pursuant to Probate Code §16061.7 and a copy of the Trust to Mark. The Notification indicated that the trust was amended on 6/29/12, after Virginia's death. Mark did not receive the amendment or the accounting requested.

Again, on 8/26/14, Mark's counsel wrote a letter requesting the trust documents that Daniel had failed to provide and again requested accounting. Daniel's counsel sent a letter that the accounting should be completed within about two weeks. Mark received a trust accounting for the period of 10/1/13 through 6/30/14, but the accounting did not conform to Probate Code §16063.

To date, Daniel has not furnished accounting that complies with the probate code, or the trust amendments. Further, he has not provided a copy of the appraisal report for the values of the real property that were to be allocated to Trust B. Daniel has provided copies of the recorded deeds showing that the appropriate properties were allocated to Trust B except for 2020 South Mary and 2003-2009 South Sarah. Daniel has also not provided an executed promissory note for \$125,000.00 naming Trust B as the holder and Trust A as the maker of the note.

Petitioner provides authority and prays for relief as follows:

1. Finding that Trust B became irrevocable on 4/17/12;
2. Finding that the 6/29/12 amendment is not applicable to Trust B;
3. Finding that any amendment made after 4/17/12 is not applicable to Trust B;
4. Compelling the trustee to provide an accounting from 4/17/12 to present that complies with Probate Code §16063;
5. Compelling the trustee to provide all amendments to the trust;
6. Confirming the transfer of the following properties to the trust:
 - 6022 North Marty Ave., APN 106-362-06S
 - 1697 East Los Altos, APN 408-253-13
 - 6750 North Millbrook, APN 408-281-07
7. Instructing the trustee to transfer the following properties to Trust B:
 - 2020 South Mary, APNs 468-341-03 and 04
 - 2003-2009 South Sarah, APNs 468-341-14 and 18
8. Instructing the trustee to execute a promissory note for \$125,000.00 with Trust B as the holder and Trust A as the maker of the note;
9. Approving the division of the trust into Trust A and Trust B;
10. For attorneys' fees and costs as permitted by law; and
11. For such other relief the court deems just and proper.

Attorney Duggan, Mark (Pro Per Petitioner)
 Attorney Pimentel, Paul J. (for Respondent Daniel J. Duggan)
 Probate Status Hearing RE: Filing of a Formal Account Starting at the Date of Death

| | | |
|---------------------------|--|--|
| Virginia L. Duggan | <p>MARK DUGGAN, Remainder Beneficiary of Trust B, the irrevocable trust created under the Daniel J. Duggan and Virginia L. Duggan Revocable Living Trust dated 5/31/11, filed Petition for Findings and Orders to Compel an Accounting or Provide Information on the Trust: Confirm the Creation and Funding of Trust B; and Instructions on Validity of Trust Amendment.</p> <p>On 7/17/15, the parties filed a Stipulation as to various facts. The Court's order thereon was entered on 8/7/15.</p> <p>At a continued hearing on 1/7/16, the Court set this status hearing re the filing of an account:</p> <p>Minute Order 1/7/16: Mr. Pimentel agrees to file an accounting as requested. No appearance is necessary at the status hearing if the petition is filed at least two court days prior. Should the status hearing come off calendar, the Petition to Compel will be continued to the date set for the accounting.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 3/10/16: Mr. Pimentel requests 30 days. If the accounting is not filed, the Court's indicated is imposition of sanctions and consideration of removal on 4/14/16, and both Mr. Pimentel and Daniel Duggan would be ordered to be personally present or present via CourtCall.</p> <p>1. Need accounting or written status report pursuant to Local Rule 7.5.</p> |
| DOD: 4/17/12 | | |
| | | |
| | | |
| | | |
| Cont. from 031016 | | |
| 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>Reviewed by: skc</p> <p>Reviewed on: 4/8/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 10B- Duggan</p> | |

Probate Status Hearing RE: Filing of the Inventory and Appraisal

| | | |
|----------------------------------|---|---|
| DOD: 11/02/14 | <p>CARL JOHNSTON, father, filed a Petition for Probate requesting to be appointed as Administrator of the Estate on 04/30/15.</p> <p>On 7/16/15, the Court appointed the Public Administrator due to substantial disagreement, and set status hearing for 12/10/15 for the filing of the Inventory and Appraisal.</p> <p>Status Report filed 12/09/15 states: The Public Administrator has been unable to prepare an Inventory & Appraisal for this estate. It is unclear if real property should be included or not and there is a vehicle out of town. A 60 day continuance is requested.</p> <p>Partial I&A No. 1 was filed 2/16/16</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 12/10/15, 2/4/16</p> <p>1. Need Final Inventory and Appraisal or written status report pursuant to Local Rule 7.5.</p> |
| Cont. from 121015, 020416 | | |
| 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>Reviewed by: JF/skc</p> <p>Reviewed on: 4/8/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 12- Johnston</p> |

13A Rodolfo Cortez Castillo (Estate) Case No. 15CEPR00746

Petitioner Castillo, Marilynn De La Cruz (Pro Per – Administrator)

Declarant Castillo, Gloria De La Cruz (Pro Per)

Probate Status Hearing Re: Filing Inventory and Appraisal

| | | |
|--|--|--|
| DOD: 07/05/2015 | <p>MARILYNN DE LA CRUZ CASTILLO, daughter, was appointed Administrator with full IAEA authority and bond set at \$500,000.00 on 10/15/2015.</p> <p>Receipt of Bond filed in the amount of \$500,000.00 on 10/19/2016.</p> <p>Letters issued on 10/19/2016.</p> <p>Inventory and Appraisal Partial No. 1 filed 03/29/2016 showing an estates valued at \$614,289.17.</p> <p>Minute Order of 10/15/2015 set this Status Hearing for the filing of the Final Inventory and Appraisal.</p> <p>Declaration from Gloria De La Cruz Castillo for the Status Hearing Regarding the Filing of the Inventory and Appraisal by Executor filed on 03/30/2016 states she is the daughter of the decedent and also an heir in this matter. For the Court's information there is an ongoing business in the estate, Central Valley Sales, which was not included by the executor in the Probate Petition. Central Valley Sales has been an on-going business since 07/2015 and has been running continuously by the executor. The executor has not provided any information such as income and expenses for the business to any of the heirs. Ms. Castillo believes the Inventory in that business is worth approximately \$400-500 thousand. She states that business supported her father for over 20 years. The executor transferred the business and other estate property to her name. Ms. Castillo states she would hate to see the business depleted because that is probably the most valuable item in the estate. After the decedent's death the executor remodeled the decedent's home without providing any information to the heirs regarding costs. Ms. Castillo asserts her sister, Elizabeth Castillo, another heir, is living in the home without paying rent. Ms. Castillo states she had her attorney draft a letter to the Executor. The executor called a meeting on 02/12/2016 however nothing was accomplished. She states the relationship between her and the executor is now very hostile.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Page 13B is the Fee Waiver Hearing of Gloria De La Cruz Castillo, Declarant.</p> <p>Minute Order of 03/17/2016: Marilyn Castillo represents that the Inventory and Appraisal is currently with Steven Diebert. Gloria Castillo is admonished with regard to making oral objections without filing and properly serving written objections.</p> <p>1. Need Final Inventory and Appraisal 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> |
| Cont. from 031716 | | |
| <input type="checkbox"/> Aff.Sub.Wit. | | |
| <input 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 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 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: LV | | |
| Reviewed on: 04/11/2016 | | |
| Updates: | | |
| Recommendation: | | |
| File 13- Castillo | | |

13B Rodolfo Cortez Castillo (Estate) Case No. 15CEPR00746

Petitioner Castillo, Gloria De La Cruz (Pro Per – Declarant)

Request to Waive Court Fees

| | | |
|----------------------|--|--|
| | <p>GLORIA DE LA CRUZ CASTILLO, is petitioner.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> |
| | | |
| | | |
| | | |
| | | |
| 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 | | |
| | <p>Reviewed by: LV</p> | |
| | <p>Reviewed on: 04/11/2016</p> | |
| | <p>Updates:</p> | |
| | <p>Recommendation:</p> | |
| | <p>File 13- Castillo</p> | |

13B

Order to Show Cause RE: Failure to File the Inventory and Appraisal

| | | |
|----------------------|--|--|
| DOD: 8/6/15 | <p>JACOB L. ROTTSOLK and REBECCA L. O'DETTE, son and daughter, were appointed Co-Administrators with Full IAEA without bond on 10/8/15. Letters issued on 10/13/15.</p> <p>Pursuant to Corrected Minute Order of 10/8/15, status hearing for the filing of the Inventory and Appraisal was set for 3/10/16. A copy of the Corrected Minute Order was mailed to Mr. Franco on 10/19/15.</p> <p>Partial I&A No. 1 was filed 10/29/15; however, no Final I&A has been filed.</p> <p>At the hearing on 3/10/16, there were no appearances. The Court issued this OSC as to Paul C. Franco as to why sanctions should not be imposed for his failure to appear, and to Jacob Rottsolk and Rebecca O'Dette as to why they should not be removed as Co-Administrators for their failure to file the Inventory and appraisal. Each are ordered to be personally present or present via CourtCall on 4/14/16, whether the Inventory and Appraisal is filed or not.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Final Inventory and Appraisal † pursuant to Probate Code §8800 or written status report pursuant to Local Rule 7.5.</p> |
| | | |
| | | |
| | | |
| | | |
| | | |
| 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>Reviewed by: skc</p> <p>Reviewed on: 4/11/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 14- Rottsolk</p> | |

Probate Status Hearing RE: Filing of an Amended Petition

| | | | |
|------------|---------------|--|--|
| Age: | | | NEEDS/PROBLEMS/COMMENTS: |
| 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 | | |
| | | | <u>OFF CALENDAR</u> |
| | | | Amended Petition filed 4/8/16 is set for hearing on 5/19/16. |
| | | | Reviewed by: skc |
| | | | Reviewed on: 4/11/16 |
| | | | Updates: |
| | | | Recommendation: |
| | | | File 15- Pacheco |

Petition for Appointment of Probate Conservator of the Person

| | | | | |
|-------------------|---------------|----------------------------------|---|---|
| | | <p>See petition for details.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator advised rights on 2/11/16</p> <p>Voting rights affected – need minute order.</p> <p><u>Minute Order 3/3/16:</u> The Court gives permission for Ms. Amador to notice via text message and/or facebook message those siblings that she is unable to locate; the messages must contain all of the pertinent information and proof must be brought to court. Mr. Bagdasarian does not need to appear on 4/14/16 unless contacted by the Examiner.</p> <p>As of 4/8/16, the following issues remain noted:</p> <ol style="list-style-type: none"> 1. Although Petitioner checked the box at #1k re dementia powers, Petitioner did not include the mandatory Judicial Council Form GC-313 Attachment Requesting Special Orders Re Dementia. Therefore, service on relatives and the proposed Conservatee did not include the specific request for dementia medication and/or placement powers. If dementia powers are requested, the Court may require this form to be separately filed and served. 2. Capacity Declaration filed 4/6/16 states the proposed Conservatee has dementia, but does not address dementia medication or placement powers at #9a and 9b. The Court may require further information. 3. Need proof of notice to the following siblings pursuant to Minute Order 3/3/16: <ul style="list-style-type: none"> - Manuel Hernandez - Natividad Hernandez - Lourdes Hernandez | |
| | | | | |
| | | | | |
| | | | | |
| Cont. from 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: 4/8/16 | |
| | | | Updates: | |
| | | | Recommendation: | |
| | | | File 17- Hernandez | |

Petition for Letters of Administration; Authorization to Administer under IAEA

| | | | |
|-------------------------------------|----------------------|---|---|
| DOD: 1/11/16 | | <p>ROSARIO ORTIZ, Daughter, is Petitioner and requests appointment as Administrator with Full IAEA with bond of \$226,500.00.</p> <p>Full IAEA – ok</p> <p>Decedent died intestate</p> <p>Residence: Kerman Publication: Business Journal</p> <p>Estimated value of estate: Personal property: \$1,500.00 Real property: \$225,000.00 Total: \$226,500.00</p> <p>Probate Referee: Rick Smith</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: The Court will set status hearings as follows:</p> <ul style="list-style-type: none"> • Thursday, June 2, 2016 for filing of bond; • Thursday, September 8, 2016 for filing Inventory and Appraisal • Thursday, June 15, 2017 for filing the first account or petition for final distribution. |
| <input type="checkbox"/> | Aff.Sub.Wit. | | |
| <input checked="" type="checkbox"/> | Verified | | |
| <input type="checkbox"/> | Inventory | | |
| <input type="checkbox"/> | PTC | | |
| <input type="checkbox"/> | Not.Cred. | | |
| <input checked="" type="checkbox"/> | Notice of Hrg | | |
| <input checked="" type="checkbox"/> | Aff.Mail | | |
| <input 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 | | |
| | | <p>Reviewed by: skc</p> <p>Reviewed on: 4/11/16</p> <p>Updates:</p> <p>Recommendation: SUBMITTED</p> <p>File 19- Dominguez</p> | |

Petition for Appointment of Probate Conservator of the Person

| | | | | |
|------------|---------------|---------------------------|--|---|
| | | See petition for details. | NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 3/25/16 Voting rights affected – need minute order. | |
| Cont. from | | | | |
| | 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: 4/11/16 | |
| | | | Updates: | |
| | | | Recommendation: | |
| | | | File 20- Plasencia | |

Petitioner Ballance, Richard (Pro Per – Father – Petitioner)
 Petitioner Ballance, Christine (Pro Per – Mother – Petitioner)
 Petitioner Diaz, Ruth (Pro Per – Sister – Petitioner)

Petition for Appointment of Probate Conservator of the Person

| | | | |
|---------------------------|---------------|---|--|
| 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> <p>1. Need video receipt from Christine Ballance and Ruth Diaz per Local Rule 7.15.8.A.</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 | X | |
| ✓ | CI Report | | |
| | 9202 | | |
| ✓ | Order | | |
| | Aff. Posting | | |
| | Status Rpt | | |
| | UCCJEA | | |
| ✓ | Citation | | |
| | FTB Notice | | |
| | | | Reviewed by: skc |
| | | | Reviewed on: 4/11/16 |
| | | | Updates: |
| | | | Recommendation: |
| | | | File 21- Ballance |

Petitioner: Amber Lynn Johnson

Petition to Determine Succession to Real Property

| | | | | |
|--|----------------------|---|--|-----|
| DOD: 11/13/09 | | <p>AMBER LYNN JOHNSON, daughter, is petitioner.</p> <p>40 days since DOD.</p> <p>No other proceedings.</p> <p>Decedent died intestate.</p> <p>I & A - \$65,000.00</p> <p>Petitioner requests Court determination that Decedent's interest in the real property located in Fresno, pass to her pursuant to intestate succession.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Petition was opened with a fee waiver. Court fees are considered a cost of administration. Therefore filing fees of \$435.00 are due. #11 of the petition does not state the decedent's interest in the real property (i.e. 100%, 50%, etc.) #9a of the order does not include the legal description, with APN, of the real property, just the physical address. #6b of the order does not include the specific property interest claimed by petitioner (i.e. 100%, 50%, etc.) | |
| Cont. from | | | | |
| <input type="checkbox"/> | Aff.Sub.Wit. | | | |
| <input checked="" type="checkbox"/> | Verified | | | |
| <input type="checkbox"/> | Inventory | | | |
| <input type="checkbox"/> | PTC | | | |
| <input type="checkbox"/> | Not.Cred. | | | |
| <input type="checkbox"/> | Notice of Hrg | | | N/A |
| <input type="checkbox"/> | Aff.Mail | | | |
| <input type="checkbox"/> | Aff.Pub. | | | |
| <input type="checkbox"/> | Sp.Ntc. | | | |
| <input type="checkbox"/> | Pers.Serv. | | | |
| <input type="checkbox"/> | Conf. Screen | | | |
| <input type="checkbox"/> | Letters | | | |
| <input type="checkbox"/> | Duties/Supp | | | |
| <input type="checkbox"/> | Objections | | | |
| <input type="checkbox"/> | Video Receipt | | | |
| <input type="checkbox"/> | CI Report | | | |
| <input type="checkbox"/> | 9202 | | | |
| <input checked="" type="checkbox"/> | Order | | | |
| <input type="checkbox"/> | Aff. Posting | | | |
| <input type="checkbox"/> | Status Rpt | | | |
| <input type="checkbox"/> | UCCJEA | | | |
| <input type="checkbox"/> | Citation | | | |
| <input type="checkbox"/> | FTB Notice | | | |
| <p>Reviewed by: KT</p> <p>Reviewed on: 4/11/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 22- Johnson</p> | | | | |

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

| | | | |
|-------------------------------------|----------------------|---|--|
| DOD: 2/3/16 | | AMOS DAVIS , Son and Named Executor without bond, is Petitioner. | NEEDS/PROBLEMS/COMMENTS: |
| | | | |
| | | Full IAEA – ok | <ol style="list-style-type: none"> The decedent resided in Selma (address is within city limits); therefore, need publication in the Selma Enterprise, not the Business Journal, per Local Rule 7.9. The list at #8 of the petition is incomplete: It does not include the Watch Tower Bible and Tract Society of Pennsylvania, which is a beneficiary under the will and also the named second alternate executor. Need proof of service of Notice of Petition to Administer Estate on Watch Tower Bible and Tract Society of Pennsylvania at least 15 days prior to the hearing per Probate Code §8110. |
| Cont. from | | Will dated 1/28/99 | |
| <input type="checkbox"/> | Aff.Sub.Wit. | S/P | <p>Note: If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> Thursday, September 8, 2016 for filing Inventory and Appraisal Thursday, June 15, 2017 for filing the first account or petition for final distribution. |
| <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/o | |
| <input checked="" 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 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: 4/11/16 |
| | | | Updates: |
| | | | Recommendation: |
| | | | File 23- Davis |

Petition for Appointment of Temporary Conservator of the Estate

| | | GENERAL HEARING 5/19/16 | NEEDS/PROBLEMS/COMMENTS: |
|-------------------------------------|---------------|---|---|
| | | <p>JON KEISLER, son, is petitioner and requests MIER KEISLER, son, be appointed as temporary conservator of the estate with bond.</p> <p>Please see petition for details.</p> | <p>1. Temporary petition states the estimated value of the estate is unknown. General petition indicates the estimated value of income of the estate is \$57,200.00 and estimated value of the real property is 175,000.00.</p> <p>2. Petition requests bond but does not state the amount of the bond. Based on the value of the personal property, income for one year and the cost of recovery the bond should be set at \$62,920.00.</p> |
| 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 | | |
| <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 type="checkbox"/> | Video Receipt | | |
| <input type="checkbox"/> | CI Report | X | |
| <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: 4/11/16 |
| | | | Updates: |
| | | | Recommendation: |
| | | | File 24- Keisler |

Petitioner

Brown, Holeigh (Pro Per – Step-Aunt – Petitioner)

Petitioner

Brown, Krista Lee (Pro Per – Step-Aunt – Petitioner)

Petition for Appointment of Temporary Guardian of the Person

| | | | | |
|------------|---------------|---------------------------|--|---|
| | | See petition for details. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. If diligence is not found, need personal service on the father pursuant to Probate Code §2250(e).</p> | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Cont. from | | | | |
| | 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: skc | |
| | | | Reviewed on: 4/11/16 | |
| | | | Updates: | |
| | | | Recommendation: | |
| | | | File 25- Reyes | |