



**1B Sharon Elaine Bess (CONS/P) Case No. 0241225**

Attorney Kruthers, Heather K. (for Public Guardian)

Conservator Christian, Elsie J. (Pro Per)

Petitioner Bland, Marvin (Pro Per – Brother)

**Petition for Appointment of Successor Probate Conservator**

<b>Age: 56</b>	<p><b>MARVIN BLAND</b>, brother, is petitioner and requests appointment as Successor Conservator of the Person with Medical Consent Powers.</p> <p style="text-align: center;"><u><b>Please see petition for details</b></u></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need <i>Conservatorship Video Viewing Certificate</i> pursuant to Local Rule 7.15.9(A).</p>
<b>Cont. from</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input checked="" type="checkbox"/> <b>Pers.Serv.</b>		
<input checked="" type="checkbox"/> <b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>		
<input checked="" type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b> <span style="float: right;">x</span>		
<input checked="" type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>	<p><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 04/11/2016</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 1B- Bess</b></p>	
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input checked="" type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		

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

**Attorney Kruthers, Heather H (for Public Guardian)**

**Probate Status Hearing Re: Next Account**

	<b>PUBLIC GUARDIAN</b> , was appointed is Conservator of the Person and Estate on 07/20/2000.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order of 01/14/2016: Counsel requests 90 days.</b></p> <p>1. Need Fourteenth Account.</p>
	Letters issued on 07/20/2000.	
<b>Cont. from 011416</b>	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.	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	Minute Order of 01/29/2015 set this Status Hearing for the filing of the next account.	
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<p><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 04/11/2016</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 2- Lopez</b></p>

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

		<b>JOSEPH KALASHIAN</b> , Conservator, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></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"/>	<b>Aff.Sub.Wit.</b>	Property: 780 W. San Ramon, Fresno	
<input checked="" type="checkbox"/>	<b>Verified</b>	Publication: Business Journal	
<input type="checkbox"/>	<b>Inventory</b>	Buyers: Howard W. Underwood and Roberta J. Underwood, husband and wife, as joint tenants	
<input type="checkbox"/>	<b>PTC</b>	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"/>	<b>Not.Cred.</b>	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"/>	<b>Notice of Hrg</b>	Terms of sale: As is, seller to pay for various inspections, title insurance, etc., half of warranty. See Attachment 4f.	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>		
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input checked="" type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> skc
			<b>Reviewed on:</b> 4/11/16
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 3- Kalashian</b>

**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

Alexxia, 4	<p style="text-align: center;"><u>TEMPORARY EXPIRES 04/14/2016</u></p> <p>YOLANDA VALDEZ, maternal grandmother, is Petitioner.</p> <p style="text-align: center;"><u>Please see petition for details</u></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></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>
Sofia, 1		
Cont. from 012116, 030316		
<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 type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
	Reviewed by: 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

<b>DOD: 4/12/2013</b>	<p><b>MEREDITH McNEIL</b>, daughter, was appointed Executor on 8/26/2013, and <i>Letters</i> issued on that date.</p> <p><b>Order Settling the First and Final Account and Report of Executrix, etc., filed 6/25/2015</b> authorized a closing reserve of <b>\$10,000.00</b>, finding that a status hearing shall be set for an informal accounting of the reserve.</p> <p><b>Notice of Calendar Setting filed 12/31/2015</b> set the status hearing for informal accounting of closing reserve on 2/4/2016.</p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>OFF CALENDAR</b>
		<b>Declaration of Counsel Re: Informal Reserve Accounting and Distribution of Reserve Funds filed 4/11/2016.</b>
<b>Cont. from 020416, 031016</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: LEG</b>
		<b>Reviewed on: 4/11/16</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 5-McNeil</b>

**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**

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

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

<b>DOD: 07/24/11</b>	<b>PAT DESANTIS</b> , friend, was appointed Administrator with Limited IAEA and without bond on 06/06/14. Letters of Administration were issued on 06/20/14.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Continued from 5/1/15, 6/11/15, 9/24/15, 1/7/16.</b>
<b>Cont. from 050115, 061115, 092415, 010716</b>	Amended Final I&A was filed 11/6/14	<b>1. Need First Account or Petition for Final Distribution or current written status report per Local Rule 7.5.</b>
<b>Aff.Sub.Wit.</b>	<p><b>Status Report filed 12/14/15 states:</b> 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> <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>	<b>Update: First and Final Account was filed 4/13/16 is set for hearing on 5/25/16.</b>
<b>Verified</b>		<b>(This status hearing is not taken off calendar because the minute order of 1/7/16 states no appearance is necessary if the petition is filed at least two court days prior. However, the petition was filed one day prior.)</b>
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: JF/skc</b>
		<b>Reviewed on: 4/11/16</b>
		<b>Updates: 4/13/16</b>
		<b>Recommendation:</b>
		<b>File 7 – Di Donna</b>

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

	<b>DEBORAH TITUS</b> , Conservator, is petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need Notice of Hearing.</p> <p>2. Need proof of service of the Notice of Hearing on:</p> <p>a. Florence Dolby (conservatee)</p> <p>b. Ruth Lind (attorney for conservatee)</p> <p><b>Declaration of Attorney Gary Bagdasarian filed on 4/13/16 states</b> Notice of Hearing was not served on Ruth Lind as they believed she was discharged as counsel for conservatee. The Petition has been personally served on Florence E. Dolby, Conservatee, and a proof of service filed. <b>Examiner note:</b> Examiner found no record in the court file relieving Ruth Lind as attorney of record for the conservatee. The court file does not contain a Notice of Hearing or proof of service showing service of this petition on the conservatee.</p> <p><b>Note:</b> 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. – Revised order received that includes the attorney fees requests for the establishment of the special needs trust.</p> <p style="text-align: center;"><b>Please see additional page</b></p> <p><b>Reviewed by:</b> KT</p> <p><b>Reviewed on:</b> 4/11/16</p> <p><b>Updates:</b> 4/12/16</p> <p><b>Recommendation:</b></p> <p><b>File 10B- Dolby</b></p>
	Account period: 8/21/14 – 11/25/15	
<b>Cont. from 3/10/16</b>	Accounting - <b>\$74,472.28</b>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Beginning POH - <b>\$50,380.63</b>	
<input checked="" type="checkbox"/> <b>Verified</b>	Ending POH - <b>\$43,709.72</b>	
<input type="checkbox"/> <b>Inventory</b>	Bond - <b>\$20,000.00</b>	
<input type="checkbox"/> <b>PTC</b>	(is sufficient)	
<input type="checkbox"/> <b>Not.Cred.</b>	Conservator - <b>waives</b>	
<input type="checkbox"/> <b>Notice of Hrg</b> X	Attorney - <b>\$9,487.50</b>	
<input type="checkbox"/> <b>Aff.Mail</b> X	(34.50 hours @ \$275.00 per hour for appt. of conservator, bond, I &A, sale of real property and accounting)	
<input type="checkbox"/> <b>Aff.Pub.</b>	Costs - <b>\$166.00</b>	
<input type="checkbox"/> <b>Sp.Ntc.</b>	(\$2,443.50 for filing fees, certified copies, probate referee, publication. \$2,277.50 has been paid by the conservator)	
<input type="checkbox"/> <b>Pers.Serv.</b>	Petitioner prays for an Order:	
<input type="checkbox"/> <b>Conf. Screen</b>	1. Approving, allowing and settling the first account of conservator and approving the acts of Petitioner as Conservator;	
<input type="checkbox"/> <b>Letters</b>	2. Authorizing payment of attorney fees in the sum of \$9,487.00 and costs of \$166.00	
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input checked="" type="checkbox"/> <b>2620(c)</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		

**Note:** If the petition is granted, status hearings will be set as follows:

- **Wednesday, February 7, 2018** at 9:00 a.m. in Department 303, for the filing of the second account.

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.

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

	<b>MARTHA JACKSON</b> , 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><b>NEEDS/PROBLEMS/COMMENTS:</b></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.—<i>Final Appraisal of Estate by Public Guardian filed 4/13/2016.</i></p>
	Ms. Jackson was removed as Conservator of the Estate and the Public Guardian was appointed per minute order of 01/14//2016.	
	Letters issued on 01/26/2016.	
<b>Cont. from</b>	<b>Minute Order of 01/14/2016</b> set this Status Hearing re: Filing of the Inventory and Appraisal and Report form the Public Guardian as to the Surcharge Issue.	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<b>Minute Order states:</b> 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.	
	<b>Status Report Regarding Possible Surcharge filed 4/13/2016 states:</b> Deputy Public Guardian Clint Yarbrough is assigned Ms. Conde's case; he reviewed the financial activity and determined that, while Ms. Jackson's handling of the estate was sloppy, she did not mismanage the estate; she used the conservatorship assets for the benefit of the conservatee; the Public Guardian asserts that no surcharge is necessary.	
		<b>Reviewed by:</b> LV
		<b>Reviewed on:</b> 04/11/2016
		<b>Updates:</b> 4/13/16 (LEG)
		<b>Recommendation:</b>
		<b>File 9- Conde</b>

**10 Daniel J. and Virginia L. Duggan Revocable Trust Case No. 15CEPR00308**

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><b>Virginia L. Duggan</b>  <b>DOD: 4/17/12</b></p>	<p><b>MARK DUGGAN</b>, 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><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
<p><b>Cont. from 050515, 070715, 081115, 092915, 111015, 010716, 031016</b></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><b>Minute Order 3/10/16: The Court orders Kevin Yee to file a substitution of attorney form forthwith. (As of 4/12/16, no substitution has been filed.)</b></p>
<p><input type="checkbox"/> <b>Aff.Sub.Wit.</b></p>		
<p><input checked="" type="checkbox"/> <b>Verified</b></p>		<p><b>Minute Order 1/7/16: Mr. Pimentel agrees to file an accounting as requested. (Accounting filed 4/11/16 is set for hearing on 5/26/16.)</b></p>
<p><input type="checkbox"/> <b>Inventory</b></p>		
<p><input type="checkbox"/> <b>PTC</b></p>		
<p><input type="checkbox"/> <b>Not.Cred.</b></p>		
<p><input checked="" type="checkbox"/> <b>Notice of Hrg</b></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><b>Note: On 4/11/16, Mark Duggan, represented by Mark D. Perryman of Perryman Law Firm, Temecula, CA, filed an ex parte application requesting that the Court set an OSC and TRO in connection with an eviction notice served Mark Duggan by Daniel Duggan. The Court may require further information or authority regarding that filing.</b></p>
<p><input checked="" type="checkbox"/> <b>Aff.Mail</b> <span style="float:right">W</span></p>		
<p><input type="checkbox"/> <b>Aff.Pub.</b></p>		
<p><input type="checkbox"/> <b>Sp.Ntc.</b></p>		
<p><input type="checkbox"/> <b>Pers.Serv.</b></p>		
<p><input type="checkbox"/> <b>Conf. Screen</b></p>		
<p><input type="checkbox"/> <b>Letters</b></p>		
<p><input type="checkbox"/> <b>Duties/Supp</b></p>		
<p><input type="checkbox"/> <b>Objections</b></p>		
<p><input type="checkbox"/> <b>Video Receipt</b></p>		
<p><input type="checkbox"/> <b>CI Report</b></p>		
<p><input type="checkbox"/> <b>9202</b></p>		
<p><input type="checkbox"/> <b>Order</b> <span style="float:right">X</span></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><b>The following issues remain noted for reference:</b></p>
<p><input type="checkbox"/> <b>Aff. Posting</b></p>		<p><b>1. The Court may require notice to Therese Tiab, the second named successor trustee, pursuant to Probate Code §17203.</b></p>
<p><input type="checkbox"/> <b>Status Rpt</b></p>		<p><b>2. Need proposed order pursuant to Local Rule 7.1.1.F.</b></p>
<p><input type="checkbox"/> <b>UCCJEA</b></p>		<p><b>Reviewed by: skc</b></p>
<p><input type="checkbox"/> <b>Citation</b></p>		<p><b>Reviewed on: 4/8/16</b></p>
<p><input type="checkbox"/> <b>FTB Notice</b></p>		<p><b>Updates: 4/12/16</b></p>
		<p><b>Recommendation:</b></p>
		<p><b>File 10A - Duggan</b></p>
	<p style="text-align:center"><b>SEE ADDITIONAL PAGES</b></p>	

**10 Daniel J. and Virginia L. Duggan Revocable Trust Case No. 15CEPR00308****Page 2**

**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.

**11 Joshua Areyano (GUARD/E) Case No. 15CEPR00427**

**Attorney Bagdasarian, Gary G. (for Laura Castillo – Guardian)**

**Probate Status Hearing Re: Filing of the Inventory and Appraisal**

<b>Age: 16</b>	<p><b>LAURA CASTILLO</b>, mother, was appointed guardian of the estate without bond on 06/30/2015.</p> <p>Letters issued on 07/15/2015</p> <p>Minute Order of 06/25/2015 set this Status Hearing for the filing of the Inventory and Appraisal.</p> <p><b>Status Report filed 04/07/2016</b> states the only asset of the Guardianship Estate is an undivided interest in real property being distributed from the Estate of Marcus Thomas Areyano (Fresno County Superior Court 14CEPR00811).</p> <p>The hearing date on the Waiver of Accounting and Report of Administrator and Petition for Settlement is set for 04/18/2016. Therefore, a request is made for a 30 day continuance to file the Inventory and Appraisal.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order of 03/03/2016:</b>This matter is trailing the estate of the minor's father. No appearance on 04/14/2016 if the Inventory and Appraisal is filed at least two court days prior.</p> <p>1. Need Inventory and Appraisal.</p>
<b>Cont. from 111915, 030316</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: LV</b>
		<b>Reviewed on: 04/11/2016</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 11 – Areyano</b>

Probate Status Hearing RE: Filing of the Inventory and Appraisal

<b>DOD: 11/02/14</b>	<p><b>CARL JOHNSTON</b>, 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><b>Status Report filed 12/09/15 states:</b> The Public Administrator has been unable to prepare an Inventory &amp; 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><b>Partial I&amp;A No. 1 was filed 2/16/16</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 12/10/15, 2/4/16</b></p> <p><b>1. Need Final Inventory and Appraisal or written status report pursuant to Local Rule 7.5.</b></p>
<b>Cont. from 121015, 020416</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<p><b>Reviewed by:</b> JF/skc</p> <p><b>Reviewed on:</b> 4/8/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 12- Johnston</b></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**

<b>DOD: 07/05/2015</b>	<p><b>MARILYNN DE LA CRUZ CASTILLO</b>, 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><b>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</b> 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><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Page 13B is the Fee Waiver Hearing of Gloria De La Cruz Castillo, Declarant.</b></p> <p><b>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.</b></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>
<b>Cont. from 031716</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b> w/		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
<b>Reviewed by: LV</b>		
<b>Reviewed on: 04/11/2016</b>		
<b>Updates:</b>		
<b>Recommendation:</b>		
<b>File 13- Castillo</b>		

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

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

**Request to Waive Court Fees**

		<p><b>GLORIA DE LA CRUZ CASTILLO, is</b> petitioner.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>		
<input type="checkbox"/>	<b>Aff.Mail</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		<p><b>Reviewed by:</b> LV</p>	
		<p><b>Reviewed on:</b> 04/11/2016</p>	
		<p><b>Updates:</b></p>	
		<p><b>Recommendation:</b></p>	
		<p><b>File 13- Castillo</b></p>	

**13B**

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

<b>DOD: 8/6/15</b>	<p><b>JACOB L. ROTTSOLK and REBECCA L. O'DETTE</b>, 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&amp;A No. 1 was filed 10/29/15; however, no Final I&amp;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><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. <b>Need Final Inventory and Appraisal † pursuant to Probate Code §8800 or written status report pursuant to Local Rule 7.5.</b></p>
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 4/11/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 14- Rottsolk</b></p>	

Probate Status Hearing RE: Filing of an Amended Petition

<b>Age:</b>		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p style="text-align: center;"><b><u>OFF CALENDAR</u></b></p> <p>Amended Petition filed 4/8/16 is set for hearing on 5/19/16.</p>
<b>DOD:</b>		
<b>Cont. from</b>		
<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	
		<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 4/11/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p>File 15- Pacheco</p>

**Petition for Appointment of Probate Conservator of the Person**

		<p>See petition for details.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></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"> <li>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.</li> <li>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.</li> <li>3. Need proof of notice to the following siblings pursuant to Minute Order 3/3/16:             <ul style="list-style-type: none"> <li>- Manuel Hernandez</li> <li>- Natividad Hernandez</li> <li>- Lourdes Hernandez</li> </ul> </li> </ol>	
Cont. from 030316				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			W
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input checked="" type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input checked="" type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 4/8/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p>File 17- Hernandez</p>				

Petitioner: Jeffery Dean James (Pro per – Stepfather)

Petitioner: Phaedra James (Pro per – Mother)

**Petition for Appointment of Probate Conservator of the Person**

		<b>NO TEMPORARY REQUESTED</b>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Court Investigator advised rights on 3/23/2016.</b></p>
		<p><b>PHAEDRA JAMES and JEFFERY DEAN JAMES</b>, mother and stepfather, request appointment as co-conservators of the person with medical consent powers.</p> <p><b>Court Investigator report filed 4/7/2016.</b></p>	
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
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<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
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<input checked="" type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input checked="" type="checkbox"/>	<b>Video Receipt</b>		
<input checked="" type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> SEF
			<b>Reviewed on:</b> 4/11/2016
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 18- Foster</b>

**Petition for Letters of Administration; Authorization to Administer under IAEA**

<b>DOD: 1/11/16</b>	<b>ROSARIO ORTIZ</b> , Daughter, is Petitioner and requests appointment as Administrator with Full IAEA with bond of \$226,500.00.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note: If granted, the Court will set status hearings as follows:</b> <ul style="list-style-type: none"> <li>• Thursday, June 2, 2016 for filing of bond;</li> <li>• Thursday, September 8, 2016 for filing Inventory and Appraisal</li> <li>• Thursday, June 15, 2017 for filing the first account or petition for final distribution.</li> </ul>
	Full IAEA – ok	
<input type="checkbox"/> Aff.Sub.Wit.	Decedent died intestate	
<input checked="" type="checkbox"/> Verified	Residence: Kerman Publication: Business Journal	
<input type="checkbox"/> Inventory	Estimated value of estate: Personal property: \$1,500.00 Real property: \$225,000.00 Total: \$226,500.00	
<input type="checkbox"/> PTC	Probate Referee: Rick Smith	
<input type="checkbox"/> Not.Cred.	<b>Opposition of Amparo Dominguez and Raquel Romero to Petition of Rosario Ortiz to Administer Estate filed 4/13/16 states</b> they oppose Ortiz' petition to administer the estate and oppose granting any powers to Ortiz under IAEA on the grounds that there is no estate requiring administration and an estate cannot be created out of the bare assertions of Ortiz; and on the grounds that Ortiz is seeking relief that could not ripen unless a judgment had first issued that is not within the original jurisdiction of the probate court; and based on the fact that Ortiz is not a suitable administrator in any case.	
<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 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		
	<b><u>SEE ADDITIONAL PAGES</u></b>	<b>Reviewed by:</b> skc <b>Reviewed on:</b> 4/11/16 <b>Updates:</b> <b>Recommendation:</b> <b>SUBMITTED</b> <b>File 19- Dominguez</b>

## Page 2

**Objectors state** the sole justification offered by Ortiz for opening a probate case is the supposed existence of "equitable interest" in real property, as evidenced in the Request for Judicial Notice filed herewith (Notice of Pendency of Action recorded 3/10/16, as filed by Petitioner on 3/14/16). Yet it is clear that title to the subject real property is vested in fee simple in one of the opposing parties, Amparo Dominguez, and has been so held by Amparo for some nine years prior to the decedent's death, as shown in Exhibit A (grant deed recorded 8/2/07). Therefore, the alleged interest belonging to the estate is nonexistent. Since a petition to appoint an administrator is not an appropriate mechanism for determination of the adverse contentions of Ortiz regarding title to the real property, and since it is clear that the only objective of Ortiz is to administer an estate containing that interest, there are no grounds for granting the petition.

Moreover, if it were necessary to appoint anyone at all, the appointee should be Amparo Dominguez, who served as the representative for the decedent for financial and legal matters during her lifetime and upon her death, as shown in Exhibit B (funeral statements). The estate property would be all personal property since the decedent had no real property or equitable interest at the time of her death, but Amparo should be allowed to file a petition for her own appointment even if the Court believes it has a current ability to find that the estate holds an "equitable interest" in the real property.

Objectors request the Ortiz petition at least not be granted until they have had the opportunity to submit evidence in the form of affidavits or declarations. See Objection for factual and legal grounds.

**Objection provides extensive background and requests that the petition be summarily denied, or alternatively that a briefing schedule and hearing date be established so that Petitioner can assert her arguments for the jurisdiction of this court and document her ground for asserting that the estate holds an equitable interest in property and also her qualifications for appointment administrator, and also so that opposing parties can properly respond.**

Petition for Appointment of Probate Conservator of the Person

		See petition for details.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Court Investigator advised rights on 3/25/16</p> <p>Voting rights affected – need minute order.</p>	
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><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <p>Court Investigator advised rights on 4/5/16</p> <p>Voting rights affected – need minute order.</p> <p>1. <del>Need video receipt from Christine Ballance and Ruth Diaz per Local Rule 7.15.8.A.</del></p> <p>Video receipts filed 4/13/16</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 on: 4/11/16
			Updates:
			Recommendation:
			File 21- Ballance

Petitioner: Amber Lynn Johnson

**Petition to Determine Succession to Real Property**

<b>DOD: 11/13/09</b>		<p><b>AMBER LYNN JOHNSON</b>, daughter, is petitioner.</p> <p>40 days since DOD.</p> <p>No other proceedings.</p> <p>Decedent died intestate.</p> <p>I &amp; A - \$65,000.00</p> <p><b>Petitioner requests</b> Court determination that Decedent's interest in the real property located in Fresno, pass to her pursuant to intestate succession.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>Petition was opened with a fee waiver. Court fees are considered a cost of administration. Therefore filing fees of \$435.00 are due.</li> <li>#11 of the petition does not state the decedent's interest in the real property (i.e. 100%, 50%, etc.)</li> <li>#9a of the order does not include the legal description, with APN, of the real property, just the physical address.</li> <li>#6b of the order does not include the specific property interest claimed by petitioner (i.e. 100%, 50%, etc.)</li> </ol>	
<b>Cont. from</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input type="checkbox"/>	<b>Notice of Hrg</b>			N/A
<input type="checkbox"/>	<b>Aff.Mail</b>			
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input type="checkbox"/>	<b>Letters</b>			
<input type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			
<p><b>Reviewed by:</b> KT</p> <p><b>Reviewed on:</b> 4/11/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 22- Johnson</b></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:
Cont. from		Full IAEA – ok	<p>1. 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.</p> <p><i>Declaration filed 4/12/16 states publication in the Business Journal was an oversight and not in strict compliance with §8121, but was a good faith attempt to comply to provide notice of hearing and establish jurisdiction. The notice was published in a newspaper of general circulation published within the county and widely circulated within a true cross-section of the area of the count in which the decedent was known. Attorney Teixeira requests the provisions of §8122 be applied to the good faith attempt to comply with the publication requirement.</i></p> <p><del>2. 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.</del></p> <p><del>Declaration filed 4/12/16 provided the address of the Watch Tower Bible and Tract Society of Pennsylvania to supplement the list at #8, but proof of service has not yet been filed. Continuation for proper notice may be required. Update: See Page 2.</del></p> <p><u>Note: If granted, the Court will set status hearings as follows:</u></p> <ul style="list-style-type: none"> <li>• Thursday, September 8, 2016 for filing Inventory and Appraisal</li> <li>• Thursday, June 15, 2017 for filing the first account or petition for final distribution.</li> </ul>
	Aff.Sub.Wit. S/P	Will dated 1/28/99	
✓	Verified		
	Inventory	Residence: Selma Publication: Business Journal	
	PTC		
	Not.Cred.		
✓	Notice of Hrg	Estimated value of estate: Personal property: \$65,000.00	
✓	Aff.Mail	w/o	
✓	Aff.Pub.	x Real property: \$150,000.00 Total: \$215,000.00	
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen	Probate Referee: Rick Smith	
✓	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: 4/12/16
			Recommendation:
			File 23- Davis

Page 2

Update: Declaration of Pamela J. Logan filed 4/13/16 states she is the assistant to Attorney J. Stanley Teixeira. On 4/12/16, she contacted the Charitable Planning Office of the Watch Tower Bible and Tract Society of Pennsylvania by telephone re the hearing on 4/14/16, and after their conversation, emailed a copy of the petition for probate and a Waiver of Notice of Hearing. Attached is a signed copy of the waiver of notice signed by Phillip Brumley, General Counsel of for the beneficiary. The original will be filed upon receipt.

Petition for Appointment of Temporary Conservator of the Estate

GENERAL HEARING 5/19/16		NEEDS/PROBLEMS/COMMENTS:	
<p><b>JON KEISLER</b>, son, is petitioner and requests <b>MIER KEISLER</b>, 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 <b>bond should be set at \$62,920.00.</b></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><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. If diligence is not found, need personal service on the father pursuant to Probate Code §2250(e).</p>	
<b>Cont. from</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			
<input type="checkbox"/>	<b>Aff.Mail</b>			
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input checked="" type="checkbox"/>	<b>Pers.Serv.</b>			W
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>			
<input checked="" type="checkbox"/>	<b>Letters</b>			
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input checked="" type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			
<b>Reviewed by:</b> skc				
<b>Reviewed on:</b> 4/11/16				
<b>Updates:</b>				
<b>Recommendation:</b>				
<b>File 25- Reyes</b>				