



## 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.



See petition for details.			<b>NEEDS/PROBLEMS/ COMMENTS:</b>  1. Need notice to maternal grandparents and all other known relatives pursuant to Probate Code §1460(b)(5).
	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/DSS Reports		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			<b>Reviewed by:</b> skc
			<b>Reviewed on:</b> 4/9/15
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 1B – Sanchez</b>

<b>DOD: 8/24/2008</b>	<b>VICTORIA PUMAREJO</b> , daughter and Executor, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note Re Estate Valuation:</b> Paragraph 7 of the <i>First Account</i> states that Petitioner's good faith estimate of the value of the real property in the estate at the beginning of the account period is <b>\$145,000.00</b>. <i>Schedule 1</i> states that Petitioner bases the valuation of the estate real property on her estimated value as stated in her initial <i>Petition for Probate</i> filed 7/14/2010. However, while Petitioner acknowledges that the <i>Final Inventory and Appraisal</i> filed 11/5/2014 values the property at <b>\$175,000.00</b>, it appears improper to disregard the Probate Referee valuation of the asset. Petitioner goes on to state that her current opinion of the value as of the date of Decedent's death in 2008 is <b>\$90,000.00</b>, only slightly higher than the value of <b>\$80,000.00</b> stated in the <i>Reappraisal for Sale</i> filed 12/9/2014. <i>Schedule 1</i> shows that Petitioner is improperly disregarding the Probate Referee valuation of the asset (contained in both of the filed appraisals) and is placing an arbitrary estimated value on the asset to use as the basis for the accounting. For purposes of statutory fee calculation under Probate Code § 10800(b), it should be noted that loss on sale of real property (here, <b>\$95,800.00</b>) should be calculated using the originally appraised (date of death) value (here, <b>\$175,000.00</b>), and not the reappraisal value.</p> <p align="center">~Please see additional page~</p> <p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 4/10/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 2 – Maestas</b></p>
<b>Cont. from</b>	<b>Account period: 8/24/2008 – 2/27/2015</b>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Accounting - <b>[\$146,000.00?]</b>	
<input type="checkbox"/> <b>Verified</b>	Beginning POH - <b>[\$146,000.00?]</b>	
<input checked="" type="checkbox"/> <b>Inventory</b>	Ending POH - <b>\$51,334.57</b> (all cash)	
<input checked="" type="checkbox"/> <b>PTC</b>		
<input checked="" type="checkbox"/> <b>Not.Cred.</b>		
<b>Notice of Hrg</b>	<b>Petitioner states:</b>	
<b>Aff.Mail</b>	<ul style="list-style-type: none"> <li>This <i>First Account</i> is filed pursuant to the Court's <i>Minute Order</i> of 12/10/2014, providing that if a <i>First Account</i> were on file by 3/2/2015, no appearance would be necessary at the status hearing on 3/4/2015;</li> <li>Petitioner also notifies the Court that she intends to file a <i>Request for Approval of First Account and for Partial Distribution</i>, based on escrow on sale of the real property (the only valuable asset) having closed on 2/20/2015;</li> <li>Petitioner believes there will be Form 1041 and 541 information returns to file for the estate for 2015, which cannot be filed until 2016;</li> <li>Petitioner anticipates having to keep the estate open until 2016, but hopes before that time to seek appropriate Court approval to make full distribution to the devisees, and possibly to also seek approval of a Final Account and Distribution.</li> </ul>	
<b>Aff.Pub.</b>		
<input checked="" type="checkbox"/> <b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b> 090710		
<b>Duties/S</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>	X	
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

**NEEDS/PROBLEMS/COMMENTS, continued:**

1. Need *Notice of Hearing* of the *First Account of Victoria Pumarejo*, and proof of mailed service of 15 days' notice prior to hearing pursuant to Probate Code §§ 1220, 11000 and 11601 for the following persons:
  - Isabel Fira Hernandez, daughter;
  - Eduvijen Fira, son;
  - Ruby Sanchez Lopez, daughter;
  - Barbara Garcia Cortez, daughter;
  - Luciano Lara, son;
  - Carmelita Lara, daughter.
2. *First Account* refers to Decedent's household furnishings having dropped in value since the time of seeking appointment as Executor. However, the *First Account* should not address Decedent's household furnishings as they were not inventoried nor appraised as part of the Decedent's estate and, based upon Petitioner's statements that this personal property has no net sale value, they should not be included as part of Petitioner's account.
3. *First Account* states that Petitioner believes there will be Form 1041 and 541 information returns to file for the estate for 2015, which cannot be filed until 2016, and that Petitioner anticipates having to keep the estate open until 2016. The exact nature and purpose of the Form 1041 and 541 information returns for this estate is unspecified by the Petitioner. It appears unnecessary that this estate should remain open for the filing of information returns, unless there is some clarification Petitioner can provide that forms the basis for the necessity of the estate remaining open for Form 1041 and 541 information return filing.
4. *First Account* does not contain a statement regarding whether notice has been sent to the Franchise Tax Board as required pursuant to Probate Code 9202(c)(1) for estates in which *Letters* were issued 7/1/2008 or after, and Court records contain no proof of service of such notice. Need proof of service of notice to the Franchise Tax Board pursuant to Probate Code 9202(c)(1).
5. Need proposed order pursuant to Local Rule 7.1.1(F). (*Note: Despite that this First Account does not request distribution or other relief, a proposed order should be submitted finding that the Court accepts this First Account of the Petitioner.*)

**Note:** Court will set a status hearing as follows:

- **Thursday, October 29, 2015 at 9:00 a.m. in Dept. 303** for the filing of the Second and Final Account and petition for final distribution.

Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the dates listed, the hearing will be taken off calendar and no appearance will be required.

**4 Juanita Mason (Estate)**

**Case No. 12CEPR00881**

**Atty Armas, J. Todd (for Gregory Taylor – Executor – Petitioner)**

**[Fifth] Amended Waiver of Accounting and Petition for Final Distribution and for Allowance of Compensation**

<b>DOD: 3-31-12</b>	<b>GREGORY TAYLOR</b> , Executor with Full IAEA without bond, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><i>Minute Order 2-18-15: Any additional proof to support the position that there is no trust or trust property may be filed. Mr. Armas requests 60 days.</i></p> <p>As of 4-9-15, nothing further has been filed.</p> <p style="text-align: center;"><u><b>SEE ADDITIONAL PAGES</b></u></p>
	Accounting is waived.	
<b>Cont. from 021815</b>	[Second] Amended I&A filed 1-15-15: \$278,817.29 (cash)	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	POH: \$278,817.29 (cash)	
<input checked="" type="checkbox"/> <b>Verified</b>	Executor (Statutory): Waived	
<input checked="" type="checkbox"/> <b>Inventory</b>	Attorney (Statutory): \$8,576.35	
<input checked="" type="checkbox"/> <b>PTC</b>	<b>Petitioner states</b> he is the sole heir of the Mason family upon the death of the Administrator Joseph Mason and has waived accounting and statutory fees.	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	<b>See also Declaration of Attorney Armas filed 10-15-14 and Declaration of Gregory Taylor filed 1-15-15.</b>	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Petitioner states the decedent and her spouse (now deceased) signed a trust that Mr. Armas had prepared for them. The trust provides for a distribution identical to the distribution set forth in the decedent's will. Although the trust was prepared and signed, no assets were transferred to the trust. Therefore, there are no trust assets. The distribution in this matter should therefore be pursuant to Article Fifth of the decedent's will.	
<input checked="" 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 checked="" type="checkbox"/> <b>Letters</b> 11-9-12		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input checked="" type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>	<b>Petitioner requests distribution as follows:</b> Christopher Taylor: \$10,000.00 Jeffrey Taylor: \$5,000.00 Nicole Taylor: \$5,000.00 Gregory Taylor, Sr.: \$250,240.94	
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 4-9-15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 4 – Mason</b>

## Page 2 - NEEDS/PROBLEMS/COMMENTS:

1. **The Court may require further clarification regarding what, exactly, the cash sum indicated on the Second Amended Inventory and Appraisal represents.**

**Background:** The first I&A filed 11-2-12 included \$204,522.95 in six separate investment accounts, plus real property valued at \$300,000.00. The I&A did not state whether the assets were the separate property or community property assets of the decedent; however, it was later noted that the same real property was also inventoried as an asset of the Estate of Joseph Mason in 14CEPR00064, along with one of the accounts listed.

An amended I&A filed 10-15-14 indicated cash of \$277,794.06, which also happened to be the amount of property on hand, with a footnote as follows: *"The above sum represents separate property of Juanita Mason. There is an additional \$277,794.06 that is assigned to the Estate of Joseph Mason as his community property interest and not subject to distribution by this estate."* (It is unclear to the Examiner what that statement means, but it appears to indicate that there was community property between the couple, but unclear what assets were in that category.)

This second amended I&A filed 1-15-15 indicates cash of \$278,817.29, with a footnote as follows: *"The above sum represents separate property of Juanita Mason."*

As noted on previous Examiner Notes, this simple cash sum does not appear to be an accurate representation of this decedent's assets as of the date of death. Petitioner explains in his declaration that all accounts were consolidated into one account, and some things like property taxes were paid from the account. However, even with that information, the I&A should still reflect the date of death assets and total, which was originally listed as six separate accounts totaling \$204,522.95, and the property on hand (POH) would be the consolidated lump sum at present.

**Note:** The attorney's statutory compensation should be based on the I&A date of death value, and if gains are used in calculation, detailed schedules of such gains must be included pursuant to Cal. Rule of Court 7.705(b). Here, the attorney is requesting compensation based on the new value, which is the POH, but no schedules are provided, and it is unclear if this sum originated as the six accounts noted on the original I&A.

**Additional note:** In addition to the house, which has since been removed from this estate, it was also noted that one of the original accounts listed (Golden 1) was also listed as an asset of the decedent's husband's estate. Need clarification: Does the amended value include that amount?

**SEE ADDITIONAL PAGES**

**Page 3 - NEEDS/PROBLEMS/COMMENTS (Continued):**

2. As previously noted, the decedent's will distributes her estate to the Mason Family Trust of 2004. Petitioner states that the trust was never funded; therefore, distribution should be made directly to heirs pursuant to Article Fifth of the decedent's will. Examiner Notes previously noted that the trust did appear to have been funded by the execution of Schedule A Transfer of Assets; therefore, distribution should be made to the Trust pursuant to Article Third of the Will, and a declaration pursuant to Local Rule 7.12.5 is needed.

Attorney Armas continues to request distribution directly to the heirs; however, no authority is provided.

Examiner notes also that Article Fifth of the will does not appear to distribute directly to the heirs as requested; rather, it appears to create a testamentary trust based on the 2004 trust.

3. Proposed order does not appear to include distribution of the residue. Need revised order based on clarification of the above noted issues and the Court's order thereon.

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

	<p><b>TERRI DENISE GILL</b>, daughter, was appointed Executor with full IAEA authority without bond on 02/13/2013.</p> <p>Letters issued 02/19/2013. Minute Order of 02/13/13 set this matter for hearing.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note: Page B is the Status Hearing on the Settlement Agreement.</b></p> <p>Status Report filed 4/6/15 states a Stipulation for Settlement is circulating and should be filed before the hearing.</p> <p>1. <b>Need First Account or Petition for Final Distribution.</b></p>
<p>Cont. from 041814, 082214, 102314, 120414</p>	<p>Inventory &amp; Appraisal Partial #1 filed 07/12/13: <b>\$77,240.00</b></p> <p>Inventory &amp; Appraisal Partial #2 filed 07/12/13: <b>\$40,024.41</b></p>	<p><b>Reviewed by:</b> LV/skc</p>
<p>Aff.Sub.Wit.</p>	<p>Inventory &amp; Appraisal Final filed 07/12/13: <b>\$19,813.34</b></p>	<p><b>Reviewed on:</b> 4/9/15</p>
<p>Verified</p>	<p><b>Status Report filed 03/10/14</b> Petitioner and Robert Hanggi, through their respective attorneys, have been in negotiations to settle the estate. As of the date of this Status Report no agreement has been made. The last offer to settle was made by Petitioner's attorneys on 12/12/2013. Mr. Pape has advised that Robert Hanggi recently had surgery and was unavailable to review the settlement proposal. Petitioner intends to file a Petition under Probate Code §850, and have the court determine the separate property and the community property interest that the Decedent owned at the time of death. Once these issues are resolved petitioner will prepare and file a Petition for Final Distribution of the Estate.</p>	<p><b>Updates:</b></p>
<p>Inventory</p>	<p><b>Former Report of Status of Administration filed 08/18/14</b> states Petitioner filed an 850 Petition seeking to have the tentative property settlement that decedent and her husband, Robert H. Hanggi, had negotiated before the death of the decedent confirmed. Petitioner has been in negotiations with counsel for Robert H. Hanggi on resolution of this matter. Robert H. Hanggi has filed a Petition for a Probate Homestead over the interest the decedent owned in the real property. The hearing on the 850 Petition and the Petition for a Probate Homestead has been continued to 10/02/2014. Petitioner believes there is a reasonable probability that the matters will be resolved at that time. Petitioner is informed and believes and thereon alleges that the estate may be in a position to close by the end of 2014. The major issue to be resolved is the amount the decedent's estate will receive from Robert Hanggi, for decedent's interest in the residence and reimbursement of the funds for the cattle which he deposited into his own account and the termination of the length of his Probate Homestead.</p>	<p><b>Recommendation:</b></p>
<p>PTC</p>		<p><b>File 5A – Hanggi</b></p>
<p>Not.Cred.</p>		
<p>Notice of Hrg</p>		
<p>Aff.Mail</p>		
<p>Aff.Pub.</p>		
<p>Sp.Ntc.</p>		
<p>Pers.Serv.</p>		
<p>Conf. Screen</p>		
<p>Letters</p>		
<p>Duties/Supp</p>		
<p>Objections</p>		
<p>Video Receipt</p>		
<p>CI Report</p>		
<p>9202</p>		
<p>Order</p>		
<p>Aff. Posting</p>		
<p>Status Rpt</p>		
<p>UCCJEA</p>		
<p>Citation</p>		
<p>FTB Notice</p>		

**Petition for Approval of Settlement**

<b>DOD: 4-14-12</b>	<b>TERRI DENISE GILL</b> , Daughter and Executor with Full IAEA without bond, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Status Report filed 4/6/15 states a Stipulation for Settlement is circulating and should be filed before the hearing.</b></p> <p><b>Note: Upon settlement, a First Account or Petition for Final Distribution is still necessary to formally close the estate. The Court will address the status hearing at Page A of this calendar as appropriate.</b></p> <ol style="list-style-type: none"> <li><b>The Stipulation is signed by the attorneys only and is not signed by the parties. The Court may require authority, or may require the stipulation to be signed by the Executor and Mr. Hanggi.</b></li> <li><b>Notice of Hearing was sent to Robert Hanggi "C/O" his attorney, Jeffrey Pape. Direct notice is required pursuant to Probate Code §1214 and Cal. Rule of Court 7.51(a).</b></li> </ol>
<b>Cont. from 031115</b>	<b>Petitioner states</b> Petitioner filed a petition under Probate Code §850 seeking to confirm the tentative property settlement that the decedent and her husband had negotiated prior to the decedent's death. The 850 Petition sought, inter alia, a determination that the decedent owned a community property interest in the Springville, CA, residence, confirming that the decedent owned a 6.16 acre parcel as her sole and separate property, and confirming ownership of funds in accounts.	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>		
<input 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 checked="" type="checkbox"/> <b>Letters</b> 2-19-13	On 5-2-14, Robert Hanggi filed a homestead petition over the decedent's interest in the Springville residence.	
<input type="checkbox"/> <b>Duties/Supp</b>	Following discussions and negotiation, Petitioner and Robert Hanggi, through their attorneys, have reached a settlement to resolve the 850 petition and the homestead petition. Petitioner believes it is for the advantage, benefit, and best interest of the estate and those interested therein that the stipulation be approved without the necessity of trial. The stipulation is contingent upon approval by this court.	
<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>	<b>Petitioner requests an order that the stipulation be confirmed and approved, and that all parties be authorized and directed to perform the stipulation according to its terms and do all acts and execute all documents that may be necessary or proper in the performance of the stipulation and in making its provisions effective.</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>See Page 2.</b>	
		<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 4/9/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p>File 5B - Hanggi</p>

**The Stipulation contains the following terms:**

- Robert Hanggi shall pay the estate the sum of \$5,000.00 for the saddle which was owned by the decedent as well as other monetary issues.
- Robert Hanggi is awarded a Probate Homestead in the community property interest which the estate has in the Springville residence for life. Robert Hanggi shall be responsible for repairs, maintenance, utilities, property taxes, and insurance on the residence.
- The license that Robert Hanggi had to use on a road on the Darlene Hanggi property is relinquished and Robert Hanggi at his sole cost and expense will build a new road on his property to access the pond on his property.
- Robert Hanggi relinquishes his license to use a water pipeline that crosses the Darlene Hanggi property, and at his sole cost and expense, will cap the line and identify the location of the capped line so the water line on the Darlene Haggi property can be located.
- The parties will reasonably cooperate with each other to bring water to the Darlene Hanggi property, including, but not limited to, easements required on the Rboert Hanggi property.
- Robert Hanggi at his sole expense will modify an existing water meter, and the estate will install a new water meter in accordance with respective entitlements.
- The parties shall share costs of a survey to determine the property line between the 10 acres owned by Robert Hanggi and the 6 acres owned by Darlene Hanggi.
- Robert Hanggi shall construct a fence, at his cost and expenses, so that cattle shall not enter the property owned by Darlene Hanggi, and shall provide a key to the lock on the gate for the Darlene Hanggi property.

<b>DOD: 10-8-13</b>	<b>PUBLIC ADMINISTRATOR</b> , Successor Administrator, is Petitioner.	<b>NEEDS/PROBLEMS/ COMMENTS:</b>  <b>Note:</b> Minute Order <b>3-11-15</b> provides, in pertinent part, for certain preliminary distributions, and that Ms. Kruthers will file an amendment to the petition regarding the distribution and submit an order re preliminary distribution.  <b>Order Allowing          Preliminary          Distributions was filed          3-16-15.</b>  <b>Update:</b> Mr. <b>Bagdasarian</b> , attorney for Former Administrator Nancy Hamilton, filed a Second Declaration on 4-2-15 requesting credit against her surcharge.  <b>As of 4-9-15, nothing          further has been filed          by the Public          Administrator.</b>  <b>The following issues          remain noted for          reference:</b>  <p style="text-align: center;"><b>SEE ADDITIONAL PAGES</b></p> <b>Reviewed by:</b> skc <b>Reviewed on:</b> 4-9-15 <b>Updates:</b> <b>Recommendation:</b> <b>File 7 - Morris</b>
<b>Cont. from 031115</b>	<b>Account period: 8-20-14 through 11-7-14</b> Accounting: \$250,917.40 Beginning POH: \$237,605.63 Ending POH: \$194,487.26 (cash)	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>	<b>Surcharge (Former Administrator): \$39,090.91</b> Petitioner states the former administrator misappropriated \$39,090.91 and should be surcharged that amount. This amount is the difference between the cash listed on the I&A and what the Public Administrator was able to marshal.	
<input checked="" type="checkbox"/> <b>Inventory</b>		
<input checked="" type="checkbox"/> <b>PTC</b>		
<input checked="" type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	<b>Public Administrator (Statutory): \$8,018.35</b>	
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>	<b>Attorneys (Statutory): \$8,018.35</b> Petitioner states the Public Administrator's attorney and Gary Bagdasarian, attorney for the former Administrator, have agreed to share statutory compensation as follows:	
<input type="checkbox"/> <b>Pers.Serv.</b>	<b>Gary Bagdasarian: \$6,018.35</b> <b>County Counsel: \$2,000.00</b>	
<input type="checkbox"/> <b>Conf. Screen</b>	<b>Public Administrator (Extraordinary): \$1,248.00</b> (\$1,000.00 for the sale of the real property, per local rule, plus \$248.00 for preparation of tax returns)	
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>	<b>County Counsel (Extraordinary): \$1,170.00</b> (for 7.8 attorney hours @ \$150/hr)	
<input type="checkbox"/> <b>Objections</b>	<b>Gary Bagdasarian (Extraordinary): \$4,372.50</b> (per declaration, discounted from \$8,745.00, for 31.80 hours @ \$275/hr in connection with the sale of the real property)	
<input type="checkbox"/> <b>Video Receipt</b>	<b>Costs: \$1002.00</b> (Attorney Bagdasarian, for filing, publication, certified copies, appraisal)	
<input type="checkbox"/> <b>CI Report</b>	<b>Bond fee: \$156.84</b>	
<input type="checkbox"/> <b>9202</b>	<b>Costs: \$537.00</b> (\$435.00 filing, plus \$102.00 processing)	
<input checked="" type="checkbox"/> <b>Order</b>	<b>Closing: \$10,000.00</b> (for any possible outstanding taxes)	
	<b>Distribution pursuant to intestate succession and          assignments: (See #1 and #2)</b> David Morris: \$33,019.72 Diane Wray: \$33,019.71 Nancy Hamilton: \$27,928.79 Inheritance Funding Company (Assignee): \$68,000.00	
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>		

Page 2

## NEEDS/PROBLEMS/COMMENTS:

1. Petitioner calculates distribution from \$161,968.22, which is the POH \$194,487.26 less \$32,519.04 for the requested fees and costs. However, Examiner calculates the total of the requested fees and costs to be \$34,523.04 (a \$2,004.00 difference), which leaves \$159,964.22 for distribution. Need clarification.
2. Petitioner's calculation for payback of the two assignment loans for the two beneficiaries is incorrect. The two beneficiaries' assignments are for different loan amounts, and contain different repayment terms, as follows:

**Per Assignment filed 6-11-14, David Morris borrowed \$15,000** in exchange for a promise to assign \$25,200 from his share. However, the agreement contains a provision that if the loan is paid back within 12 months, the **payoff would be reduced to \$22,400.00**.

**Per Assignment filed 11-5-14, Diane Rogers borrowed \$5,000.00** in exchange for a promise to assign \$8,800.00 from her share. However, the agreement contains a provision that if the loan is paid back within 6 months, the **payoff would be reduced to \$7,800.00**.

**Therefore, need amended petition reflecting corrected distribution, pursuant to #1 and #2 above.**

3. The petition does not address whether notice was required pursuant to Probate Code §9202(b) (Victim Comp).
4. Petitioner states the whereabouts of Former Administrator Nancy Hamilton are unknown; therefore, Notice of Hearing was not given to her. The Court may require a declaration of due diligence.
5. Pursuant to Probate Code §10953, the Court may compel the attorney for the absconded personal representative to file an account. If required, the Court may set a status hearing for the filing of the account.



DOD: 1/26/15		JANET PARKMAN, Named Alternate Executor without bond, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> The Court will set status hearings as follows:</p> <ul style="list-style-type: none"> <li>• Wednesday, Sept. 16, 2015 for filing the Inventory and Appraisal</li> <li>• Wednesday, July 13, 2016 for filing the first account or petition for final distribution.</li> </ul> <p>If the proper items are on file prior to the status hearing dates pursuant to Local Rule 7.5, the status hearings may come off calendar. Otherwise, written status report is necessary.</p>	
		Named Executor Charles D. Stotts predeceased the decedent.		
	Aff.Sub.Wit.	S/P		Full IAEA – ok
✓	Verified			Will dated 1/18/07
	Inventory			Residence: Fresno
	PTC			Publication: Business Journal
	Not.Cred.			Estimated value of estate:
✓	Notice of Hrg			Personal property: \$ 45,500.00
✓	Aff.Mail	w/o		Annual income: \$ 500.00
✓	Aff.Pub.			Real property: \$130,000.00
	Sp.Ntc.			Total: \$176,000.00
	Pers.Serv.			Probate Referee: Steven Diebert
	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 4/9/15	
			Updates:	
			Recommendation: SUBMITTED	
			File 11 – Stotts	



**21 Malaysia Ramirez, Jacob Ramirez, Nigeria Ramirez & Carlos Johnson (GUARD/P)**  
**Case No. 09CEPR00158**

**Atty Garrido-Ross, Emily Erica (pro per – maternal grandmother/Petitioner)**  
**Petition for Appointment of Guardian of the Person (Prob. C. 1510)**

<b>Malaysia, 13</b>	<b><u>TEMPORARY EXPIRES 04/15/15</u></b>		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><u>CONTINUED FROM 03/04/15 Minute Order from 03/04/15</u></b> states: The petitioner is provided a copy of the examiner notes and directed to cure the defects. The petitioner is ordered not to leave the children alone with mother.</p> <p>1. Need proof of service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> <i>Consent &amp; Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for:</p> <ul style="list-style-type: none"> <li>a. Theodoro Jesus Wiley Ramirez (father of Malaysia, Jacob &amp; Nigeria) – personal service required</li> <li>b. Clement Johnson (father of Carlos) – personal service required</li> <li>c. Paternal grandparents – service by mail ok</li> <li>d. Jesse Marquez (maternal grandfather) – service by mail ok</li> </ul>
<b>Jacob, 11</b>	<b>EMILY ERICA GARRIDO-ROSS</b> , maternal grandmother, is Petitioner.		
<b>Nigeria, 9</b>	Father (Malaysia, Jacob & Nigeria): <b>THEODORO JESUS WILEY RAMIREZ</b>		
<b>Carlos, 7</b>	Father (Carlos): <b>CLEMENT JOHNSON</b>		
	Mother: <b>CHRISTINA MONIQUE MARQUEZ-SOTO</b> – personally served on 01/05/15; <i>Consent &amp; Waiver of Notice</i> filed 03/23/15		
<b>Cont. from 030415</b>			
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/> <b>Verified</b>	Paternal grandparents (all): UNKNOWN		
<input type="checkbox"/> <b>Inventory</b>	Maternal grandfather: JESSE MARQUEZ, Sr.		
<input type="checkbox"/> <b>PTC</b>	<b>Petitioner states</b> [see petition for details]		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	<b>DSS Social Worker Irma Ramirez filed a report on 02/23/15.</b>		
<input type="checkbox"/> <b>Aff.Mail</b>	X		
<input type="checkbox"/> <b>Aff.Pub.</b>	<b>Court Investigator JoAnn Morris filed a report on 03/30/15.</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 checked="" type="checkbox"/> <b>CI Report</b>			
<input type="checkbox"/> <b>9202</b>			
<input checked="" type="checkbox"/> <b>Order</b>			
<input type="checkbox"/> <b>Aff. Posting</b>			
<input type="checkbox"/> <b>Status Rpt</b>			
<input checked="" type="checkbox"/> <b>UCCJEA</b>			
<input type="checkbox"/> <b>Citation</b>			
<input type="checkbox"/> <b>FTB Notice</b>			
			<b>Reviewed by:</b> JF
			<b>Reviewed on:</b> 04/09/15
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 21 - Ramirez</b>

<b>DOD: Not provided</b>		<b>CHARLOTTE A. YOUNG</b> , Conservator without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Account period: 5-12-13 through 6-30-14	<ol style="list-style-type: none"> <li>1. <b>Need Notice of Hearing.</b></li> <li>2. <b>Need proof of service of Notice of Hearing at least 15 days prior to the hearing per Probate Code §§ 1460, 1461.5 on:</b> - Office of Veterans Administration</li> <li>3. <b>There are numerous bank and ATM charges. The Court may require clarification.</b></li> <li>4. <b>Need order.</b></li> </ol>
		Accounting: \$ 23,376.81	
		Beginning POH: \$ 2.14	
		Ending POH: \$ 748.32	
<b>Cont from 010615, 030315</b>		Conservator: \$750.00 (\$50/month)	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Petitioner requests an order:	
<input checked="" type="checkbox"/>	<b>Verified</b>	1. For settlement and allowance of this account and report and approval and confirmation of the acts of petitioner as conservator;	
<input type="checkbox"/>	<b>Inventory</b>	2. For \$750 as compensation to the conservator for her services to the Conservatee during the period of this account;	
<input type="checkbox"/>	<b>PTC</b>	3. For such other orders as the Court deems proper.	
<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>2620(c)</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>		
			<b>Reviewed by:</b> skc
			<b>Reviewed on:</b> 4-9-15
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 22 - Hopkins</b>

Age: 14	<b><u>TEMPORARY EXPIRES 04/15/15</u></b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<p><b>GLORIA DUNN</b>, maternal grandmother, is Petitioner.</p> <p>Father: <b>MICHAEL VASQUEZ</b> – served by mail on 01/05/15 with Notice of Hearing only</p> <p>Mother: <b>KOGIAH ETHRIDGE</b> – Consent &amp; Waiver of Notice filed 12/22/14</p> <p>Paternal grandparents: UNKNOWN</p> <p>Maternal grandfather: CHARLES BROWN – declaration of due diligence filed 04/06/15 states that Charles Brown is not the maternal grandfather</p> <p>Siblings: MIKE ETHRIDGE, NYASTA THOMAS – both served by mail on 01/05/15 with Notice of Hearing only</p> <p><b>Petitioner states</b> [see Petition for details].</p> <p><b>Court Investigator Charlotte Bien filed a report on 02/06/15.</b></p>		<p><b><u>CONTINUED FROM 02/25/15</u></b></p> <p>1. Need proof of service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> <i>Consent &amp; Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for:</p> <ul style="list-style-type: none"> <li>a. Michael Vasquez (father) – proof of service filed 01/07/15 indicates that Mr. Vasquez was served by mail with a copy of the Notice of Hearing only. Need proof of personal service with a copy of the <i>Petition</i>.</li> <li>b. Paternal grandparents – service by mail sufficient</li> <li>c. Maternal grandfather – Petition states that Charles Brown is the maternal grandfather; however Declaration of Due Diligence states he is not the maternal grandfather; need clarification</li> <li>d. Mike Ethridge (brother) and Nyasta Thomas (sister) – proof of service filed 01/07/15 indicates that they were served with Notice of Hearing only. Need proof of service of Notice of Hearing with a copy of the <i>Petition</i>.</li> </ul> <p><b>Note:</b> Proofs of Service were filed 04/06/15 showing service by mail to Greg Bradley and Lupe Collins, however their relationship to the minor is unknown.</p>
<b>Cont. from 022515</b>			
<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 type="checkbox"/> Pers.Serv.			
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input checked="" type="checkbox"/> CI Report			
<input 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			
			<b>Reviewed by:</b> JF
			<b>Reviewed on:</b> 04/10/15
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 23 - Ethridge</b>

Petition for Appointment of Temporary Conservatorship of the Person and Estate

		See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  Court Investigator advised rights on 3/30/15  Continued from 4/7/15. Petitioner has now filed consents of family members and proof of service on the proposed Conservatee, as well as a declaration with attachments including bills and a statement regarding selling her mother's home.  1. The Court may also require notice to the Fresno County Public Guardian and County Counsel in connection with separate proceedings involving this proposed Conservatee.  2. The Court may require bond of \$38,288.80, which includes the Proposed Conservatee's income and the check for \$27,200.00, plus an amount for recovery pursuant to Probate Code §2320(c)(4) and Cal. Rule of Court 7.207, or may require funds blocked pending further consideration.	
Cont. from 040715				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			W
✓	Conf. Screen			
	Letters			X
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order	X		
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
		Reviewed by: skc		
		Reviewed on: 4/9/15		
		Updates:		
		Recommendation:		
		File 29 – Conde		

		See petition for details.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Minute Order 4/8/15:</u> The Court orders Ms. Phillips to bring proof of school enrollment to court on 4/15/15.</p> <p>1. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing on David Phillips (Father) pursuant to Probate Code §2250(e).</p>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			W
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 4/8/15	
			Updates:	
			Recommendation:	
			File 28 – Phillips	