1 **Marjorie June Angell (CONS/PE)** **Case No. 0231943**

Atty **Lucich, Nicholas L, Jr. (for Claudia Spaulding – Conservator – Petitioner)**

(1) Second Account and Report of Successor Conservator and (2) Petition for Conservator's Fees and Attorney's Fees and for (3) Order Reducing Weekly Allowance to Conservatee

Age: 62		
DOB: 3-28-50		
	Aff.Sub.Wit.	
✔	**Verified**	
	Inventory	
	PTC	
	Not.Cred.	
✔	**Notice of Hrg**	
✔	**Aff.Mail**	W
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
✔	**2620(c)**	
✔	**Order**	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

CLAUDIA SPAULDING, Conservator, is Petitioner.

Account period: 1-1-10 through 12-31-11

Accounting: $ 109,947.81
Beginning POH: $ 98,006.83
Ending POH: $ 36,533.62

Conservator: $ 10,007.50
(656.50 hours @ $10.00-$25.00/hr, itemized)

Attorney: $ 1,400.00 (Less than local rule)
Attorney: $ 300.00 (will preparation)

Petitioner states the Conservator herein is also the Trustee of the Elizabeth Catherine Angell Trust (Page 2). The Conservatorship Estate owns a one-half interest in the residence where the Conservatee resides, and the other half owned by the Trust. The Conservatee is the sole current beneficiary of the Trust and the remainder beneficiaries are entitled to distributions only after the Conservatee's death. Petitioner states that although Conservatorship Estate assets have been reduced, the trust has sufficient assets to provide for the Conservatee and if additional funds are needed, funds will be distributed from the Trust to the Conservatorship Estate, including payment for any attorney's and Conservator's fees approved by the Court.

Petitioner requests to reduce the Conservatee's allowance and states that the Conservatee has used the $300.00/week previously approved for food, clothing, and auto and household expenses for unnecessary items; therefore, the Conservator requests a reduction in the weekly allowance to $200.00/week, which the Conservator believes is adequate.

Petitioner prays for an Order:

1. Settling and allowing the Second Account;
2. Authorizing the Conservator and Attorney fees and commissions;
3. Reducing the Conservatee's weekly allowance to $200.00/week; and
4. For such other and further relief as the Court may deem proper.

NEEDS/PROBLEMS/ COMMENTS:

Note: Page 2 of this calendar, the Elizabeth Catherine Angell Trust, is a related matter.

Reviewed by: skc
Reviewed on: 4-6-12
Updates:
Recommendation:
File 1 - Angell

Dept. 303, 9:00 a.m. Monday, April 16, 2012

2 Elizabeth Catherine Angell, Trust Case No. 0545030

Atty **Lucich, Nicholas L, Jr. (for Claudia Spaulding – Trustee – Petitioner)**

Thirteenth Account and Report of Trustee, Petition for Settlement Thereof and for Allowance of Trustee's Fees and Attorney's Fees

	Aff.Sub.Wit.	
✔	Verified	
	Inventory	
	PTC	
	Not.Cred.	
✔	Notice of Hrg	
✔	Aff.Mail	W
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
✔	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

CLAUDIA SPAULDING, Trustee, is Petitioner.

Account period: 1-1-10 through 12-31-11

Accounting: $ 375,325.00
Beginning POH: $ 358,542.55
Ending POH: $ 359,097.28

Trustee: $ 2,505.00
(83.5 hours @ $30.00/hr, itemized. Services include bookkeeping, writing checks, trips to bank, record management for accounting and taxes, communications, assembling data and records for this account, meeting with contractors regarding repairs to the residence, etc.)

Attorney: $ 750.00 (3 hours @ $250.00/hr)

Petitioner prays for an Order:

1. Settling and allowing the 13th Account and confirming and approving the acts of Petitioner as Trustee;
2. Authorizing the trustee and attorney fees and commissions; and
3. For such other and further relive as the Court may deem proper.

NEEDS/PROBLEMS/COMMENTS:

Reviewed by: skc
Reviewed on: 4-6-12
Updates:
Recommendation:
File 2 - Angell

Dept. 303, 9:00 a.m. Monday, April 16, 2012

3 **Raymond Joseph Lemos, Jr. (Estate) [Lead** **Case No. 06CEPR00443**

Atty Hayden, Layne E.
Atty Bergin, Robert E Jr
Atty Fanucchi, Edward L.
Atty Doerksen, Charles L.
Atty Gingo, George M.

Notice of Motion and Motion for Summary Judgment or in the Alternative for Summary Adjudication, Originally filed Dec. 01, 2010

Age:				NEEDS/PROBLEMS/COMMENTS:
DOD:				*Examiner Notes will not be prepared for this matter.*
Cont. from				
	Aff.Sub.Wit.			
	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order			
	Aff. Posting			Reviewed by:
	Status Rpt			Reviewed on:
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 3 - Lemos

Dept. 303, 9:00 a.m. Monday, April 16, 2012

4 Jamie E. McGlashan (CONS/PE) **Case No. 10CEPR00285**

Atty Howk, Robert L (for Petitioner/Conservator Craig McGlashan)

Petition for First Account and Report of Conservator (Probate Code 2620)

Age: 89 years DOB: 10/6/1922		
Cont. from 020112, 031212		
	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
✓	Notice of Hrg	
✓	Aff.Mail	W/
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	2620(c)	X
	Order	X
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

CRAIG MCGLASHAN, Conservator, is petitioner.

Account period: 5/24/10 – 5/30/11

Accounting - **$1,773,164.49**
Beginning POH- **$ 872,934.64**
Ending POH - **$1,691.981.80**

Current bond is $1,099,584.00

Conservator - **waives**

Attorney - **$800.00**

Petitioner states the current bond is less than the value of the estate. Petitioner states he is a member of the State Bar and is the only child of the conservatee and request that the court leave the bond set at the current amount.

Petitioner prays for an Order:

1. That Petitioner be directed to pay the sum of $800.00 to the Law Office of Howk and Downing.
2. The court order that the Conservatee is not able to complete an affidavit of voter registration;
3. All acts and transactions of the Conservator of the Person and Estate of Jamie E. McGlashan, as set forth in the account and report or relating to matters set forth in the account and report be ratified, confirmed and approved.

NEEDS/PROBLEMS/COMMENTS:

NEED AMENDED ACCOUNT. In addition to the issues listed below a Supplemental Inventory and Appraisal was filed on 4/2/12 and it appears the account no longer balances.

1. **Summary of Account is not on the mandatory Judicial Council form. Probate Code 2620(a).**
2. **Need Board and Care Statements. Probate Code §2620(c)(5).**
3. **Need bank statements. Probate Code §2620(c)(2)**
4. **Morgan Stanley Smith Barney Account was not appraised by the Probate Referee as required. Probate Code §2610(c) and Probate Code §8901.**
5. **Inventory and appraisals filed total $1,084.929.64. Beginning property on hand totals $872,934.64. Beginning property on hand should be the inventory and appraisal amount.**
6. **Petitioner sold real property of the conservatorship (court confirmed) during this account period. Need original closing escrow statements. Probate Code §2620(c)(4).**

Please see additional page

Reviewed by: KT
Reviewed on: 4/6/12
Updates:
Recommendation:
File 4 - McGlashan

Dept. 303, 9:00 a.m. Monday, April 16, 2012

7. **Schedule B- Gain on Sale lists the gain on the sale of the real property as $164.38. The gain is the difference between the inventory and appraisal value ($220,000) and the sale price ($240,000). Therefore the gain on sale is $20,000.00.**

8. **Disbursement schedule includes a disbursement to Howk & Downing in the amount of $2,743.04 for costs and filing fee associated with conservatorship. Need itemization of costs and filing fee.**

9. **Disbursement schedule includes a disbursement to Craig McGlashan for pre-conservatorship expenses in the amount of $947.50. Need itemization.**

10. **Disbursement schedule includes a retuned item chargeback fee to Bank of America in the amount of $36.00. Court may require clarification.**

11. **1999 Jaguar is valued at $8,500.00 on the inventory and appraisal. The property on hand at the end of the account period lists the Jaguar valued at $8,510.00.**

12. **If court requires bond to be increased pursuant to Probate Code §2320, bond should be increased to $1,907.217.24.**

13. **Need Order**

5 **Anthony John Ellsworth (GUARD/E)** **Case No. 10CEPR00452**

Atty **Flanigan, Philip M. (for Petitioner/Guardian Jennifer Loeffler)**

(1) First Account and Report of Guardian and (2) Petition for Order Approving, Allowing and Settling Account and Report of Guardian

Age: 17 years
DOB: 9/24/1994

Cont. from

	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	X
	Aff.Mail	X
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	2620(c)	X
	Order	X
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

JENNIFER LOEFFLER, guardian, is petitioner.

Account period: 8/3/10 – 2/29/12

Accounting - **$225,734.60**
Beginning POH - **$224,998.80**
Ending POH - **$225,734.60**
(all funds are in a blocked account)

Guardian - **waives**

Attorney - **not addressed**

Petitioner prays for an order approving, allowing and settling the first account and report of guardian.

NEEDS/PROBLEMS/COMMENTS:

1. **Need *Notice of Hearing.***
2. **Need proof of service of the *Notice of Hearing* on Anthony Ellsworth (minor)**
3. **Need property on hand schedule.**
4. **Need bank statements pursuant to Probate Code 2620.**
5. **Need Order**

Reviewed by: KT
Reviewed on: 4/6/12
Updates:
Recommendation:
File 5 - Ellsworth

Dept. 303, 9:00 a.m. Monday, April 16, 2012

6 **Ruth Ford (Estate)** **Case No. 10CEPR00588**

Atty **Kruthers, Heather (for the Petitioner/Administrator Public Administrator)**

(1) First and Final Account and Report of Successor Administrator and (2) Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and (3) for Distribution [Prob. C. 216; 9202; 10800; 10810; 10951; 11600; 11850(a)]

DOD: 1/1/1996

Cont. from 020812, 031912

	Aff.Sub.Wit.	
✓	Verified	
✓	Inventory	
✓	PTC	
✓	Not.Cred.	
✓	Notice of Hrg	W/
✓	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
✓	Letters	9/13/10
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
✓	9202	
✓	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
✓	FTB Notice	

PUBLIC ADMINISTRATOR, Administrator, is Petitioner.

Account period: 9/13/10 – 10/31/11

Accounting	-	**$50,000.00**
Beginning POH	-	**$50,000.00**
Ending POH	-	**$24,070.86**
Administrator (statutory)	-	**$1,600.00**
Administrator X/O (for sale of real property and preparation of tax returns)	-	**$1,248.00**
Attorney (statutory)	-	**$1,600.00**
Bond fee	-	**$125.00** (o.k.
Court fee (certified copies)	-	**$25.50**
Closing	-	**$500.00**

Distribution, pursuant to intestate succession, is to:

Larry Ford, Carmen Gant, Yvonne Ford, Shirley Shackelford, Diane Levi, Leo Ford, Tony Ford, Alfred Ford and Garfield Gilbert - $1,688.85 each.

Amanda Ford and Robert Ford, III - $844.43 each and

Louis Ireland, Lamont Ireland and Kelly Ireland - $562.95 each.

NEEDS/PROBLEMS/COMMENTS:

Continued from3/19/12. Minute order states Counsel informs the court that she needs to file an amended accounting. *As of 4/6/12 an amended accounting has not been filed.*

1. **Petitioner filed a Petition for Court Authorization to Sell Real Property on 3/11/11using a fee waiver because at the time the estate had no cash. The Petition was heard on 4/28/11 and granted. It appears that now that the property has been sold that the filing of $395.00 should be paid as a cost of administration.**

Reviewed by: KT

Reviewed on: 3/6/12

Updates:

Recommendation:

File 6 - Ford

7 **Oralla Hope Lewis (CONS/PE)** **Case No. 10CEPR01069**

Atty **Bagdasarian, Gary G. (for Conservator Amy Idhe)**

Probate Status Hearing Re: Filing of Final Accounting

DOD: 2/29/12	**AMY IHDE**, daughter, was appointed conservator of the person and estate on 1/27/11 with bond set at $19,000.00 On 2/29/12 the conservatee died. This status hearing was set for the filing of the final account.	**NEEDS/PROBLEMS/COMMENTS:** 1. **Need Final Account or current Status Report.**
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		**Reviewed by: KT**
Status Rpt		**Reviewed on: 4/6/12**
UCCJEA		**Updates:**
Citation		**Recommendation:**
FTB Notice		**File 7 - Lewis**

8 **Concepcion Rubio Sedano (Estate)** **Case No. 11CEPR00036**

Atty **Petty, Teresa B. (for Patricia Sedano – Executor – Petitioner)**

(1) First and Final Report of Executor on Waiver of Account and (2) Petition for Settlement Thereof, for (3) Waiver of Executor's Compensation for Ordinary Services, for Allowance of Attorney's Fees for Ordinary Services and for (4) Final Distribution (Prob. C. 10800, 10810, 10954, 12200)

DOD: 6-13-10		
	Aff.Sub.Wit.	
✔	Verified	
✔	Inventory	
✔	PTC	
✔	Not.Cred.	
✔	Notice of Hrg	
✔	Aff.Mail	W
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
✔	Letters	3-1-11
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
✔	9202	
✔	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
✔	FTB Notice	

PATRICIA SEDANO, Executor with Full IAEA without bond, is Petitioner.

Accounting is waived.

I&A: $165,000.00
POH: $165,000.00 (real property only)

Executor (Statutory): Waived

Attorney (Statutory): $5,950.00

Distribution pursuant to Decedent's will is to:

Patricia Sedano – Entire estate consisting of real property valued at $165,000.00.

NEEDS/PROBLEMS/COMMENTS:

Reviewed by: skc

Reviewed on: 4-12-12

Updates:

Recommendation: SUBMITTED

File 8 - Sedano

Dept. 303, 9:00 a.m. Monday, April 16, 2012

9 **Selina Pasillas (CONS/PE)** **Case No. 11CEPR01030**

Atty **Wright, Janet L. (Court Appointed for Conservatee/Petitioner)**

Petition for Attorney's Fees for Court Appointed Counsel for Conservatee and Request for Termination of Appointment and Discharge as Court Appointed Counsel (Prob. C. 1470(b))

DOD: 03/07/12		
Cont. from		
	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
✓	Notice of Hrg	
✓	Aff.Mail	w/
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
✓	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

JANET WRIGHT, Petitioner, was Court appointed to represent the Conservatee on 11/28/11.

PUBLIC GUARDIAN, was appointed Temporary Conservator of the Person and Estate on 11/17/11. The Temporary Conservatorship was extended three times to 03/08/12. Conservatee died on 03/07/12, therefore a permanent conservatorship was not established.

Petitioner requests fees in connection with the representation of the Conservatee for the Public Guardian's petition to appoint a conservator.

Petitioner **asks that she be paid** from the conservatorship estate for **12.35 attorney hours @ $250.00/hr. and 3.4 paralegal hours @ $110.00/hr. for a total of $3,474.00.**

Services are itemized by date and include review of documents, visits with client, and court appearances.

Petitioner requests that, since the conservatee is now deceased, that her appointment as Counsel for the conservatee be terminated

NEEDS/PROBLEMS/COMMENTS:

Reviewed by: JF

Reviewed on: 04/06/12

Updates:

Recommendation:

File 9 - Pasillas

Dept. 303, 9:00 a.m. Monday, April 16, 2012

10 Wilfred Carl Mell aka Wilfred C. Mell (Estate) Case No. 12CEPR00225

Atty Burnside, Leigh W. (for Dale L. Mell – grandson/Petitioner)

Petition for Probate of Will and for Letters of Administration with Will Annexed; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 03/29/09		
Cont. from		
	Aff.Sub.Wit.	s/p
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
✓	Notice of Hrg	
✓	Aff.Mail	w/
✓	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
✓	Letters	
✓	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
✓	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

DALE L. MELL, grandson, is Petitioner and requests appointment as Administrator with Will Annexed, with bond set at $158,600.00.

In the alternative, the Petitioner requests appoint of the Public Guardian as Administrator with Will Annexed without bond.

Full IAEA – ok

Will dated 02/07/02

Residence: Fresno
Publication: The Business Journal

Estimated Value of the Estate:

Personal property	-	Unknown
Real property	-	$158,600.00
Total	-	**$158,600.00**

Probate Referee: **RICK SMITH**

NEEDS/PROBLEMS/COMMENTS:

1. **The original Will does not appear to have been deposited with the Court. Need original Will.**

Reviewed by: JF
Reviewed on: 04/06/12
Updates:
Recommendation:
File 10 - Mell

Dept. 303, 9:00 a.m. Monday, April 16, 2012

11 Frank J. Valla aka Frank John Valla (Estate) Case No. 12CEPR00231

Atty **Gunner, Kevin D. (for David M. Valla – son/Petitioner)**

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450

DOD: 08/14/11			**DAVID MICHAEL VALLA,** son, is Petitioner and requests appointment as Administrator without bond.
Cont. from			
	Aff.Sub.Wit.		Full IAEA – ok
✓	**Verified**		
	Inventory		All heirs waive bond.
	PTC		
	Not.Cred.		Decedent died intestate.
✓	**Notice of Hrg**		Residence: Fresno
✓	**Aff.Mail**	w/o	Publication: The Business Journal
✓	**Aff.Pub.**		
	Sp.Ntc.		**Estimated Value of the Estate:**
	Pers.Serv.		Real property - $190,000.00
	Conf. Screen		
✓	**Letters**		Probate Referee: **RICK SMITH**
✓	**Duties/Supp**		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	**Order**		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

NEEDS/PROBLEMS/COMMENTS:
Reviewed by: JF
Reviewed on: 04/06/12
Updates:
Recommendation: SUBMITTED
File 11 - Valla

Dept. 303, 9:00 a.m. Monday, April 16, 2012

12 Leroy Alvin Persons (CONS/PE) Case No. 10CEPR00625

Atty Persons, Leroy R. (pro per – former Conservator of the Person & Estate)

Atty Kruthers, Heather H. (for Public Guardian – Temporary Conservator of the Person & Estate)

Status Hearing Re: Abandoned Property and Securing of Medi-Cal Benefits

Age: 83
DOB: 02/23/28

Cont. from 112811, 020612

	Aff.Sub.Wit.	
	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

TEMPORARY EXPIRES 04/16/12

LEROY R. PERSONS, was appointed as Conservator of the Person & Estate of Leroy Alvin Persons and Letters were issued on 11/29/10.

Minute Order from Status Hearing on 09/26/11 set this matter for status and states: The Court accepts the voluntary resignation of Leroy Parsons and relieves him as conservator of the person and estate. The Court appoints the Public Guardian as temporary successor conservator of the person and estate.

Status Report filed 02/01/12 states that the Public Guardian is still working on obtaining Medi-Cal benefits for the Conservatee and is currently addressing specific issues that Medi-Cal has identified. The Public Guardian requests a continuance of at least 60 days in order to allow time to respond to Medi-Cal.

Ex Parte Petition for Instruction and Authorization to Abandon Real Property filed 02/07/12 by the Public Guardian was granted on 02/07/12.

Status Report Re: Abandoned Property and Securing of Medi-Cal Benefits by Public Guardian filed 04/06/12 states: The Court authorized the abandonment of conservatees real property on 02/07/12 and the conservatee is now on Medi-Cal. Currently, the Public Guardian is working on getting the requirements for admission into a skilled nursing facility. In order to allow time to obtain the needed information and find suitable placement, the Public Guardian requests that the next status hearing be set no earlier than 60 days from the date of the hearing.

NEEDS/PROBLEMS/COMMENTS:

CONTINUED FROM 02/06/12

Reviewed by: JF

Reviewed on: 04/06/12

Updates: 04/09/12

Recommendation:

File 12 - Persons

13 William K. Poston & Wilma B Poston Living Case No. 11CEPR00737

Atty Erlach, Mara M. (of DAK, for Douglas Poston, William Poston, Jr., and Kristin Calderon – Petitioners)

Atty Motsenbocker, G. L. (for Lynda Evans – Respondent)

Status Re: Settlement

	Aff.Sub.Wit.	
	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	
	Aff. Posting	
	Status Rpt	X
	UCCJEA	
	Citation	
	FTB Notice	

DOUGLAS POSTON, WILLIAM K POSTON, JR., and KRISTIN CALDERON, beneficiaries of the William K. Poston and Wilma B. Poston Living Trust dated 9-3-99, filed a Petition for Order Compelling Trustee to Account and Report, for Surcharge, and for Removal.

LYNDA EVANS is Respondent.

On 10-4-11, the Court appointed William K. Poston, Jr., as successor trustee and set the matter for settlement conference and trial.

At the trial date on 2-14-12, Attorney Erlach advised the Court that the parties have been attempting to settle amongst themselves and have been ignoring both counsel. The Court took the trial off calendar and set this status hearing regarding settlement.

As of 4-6-12, nothing further has been filed.

NEEDS/PROBLEMS/COMMENTS:

1. **Need status of settlement.**

Reviewed by: skc

Reviewed on: 4-6-12

Updates:

Recommendation:

File 13 - Poston

Dept. 303, 9:00 a.m. Monday, April 16, 2012

14 Anthony V Deen (GUARD/P) **Case No. 06CEPR00014**

Atty Womack, Wanda Kathleen (Pro Per – Guardian – Petitioner)

Atty Womack, Jesse W. (Pro Per – Guardian – Petitioner)

Petition for Termination of Guardianship

Age: 13		
DOB: 6-8-98		
	Aff.Sub.Wit.	
✔	**Verified**	
	Inventory	
	PTC	
	Not.Cred.	
✔	**Notice of Hrg**	
✔	**Aff.Mail**	W
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	X
	9202	
✔	**Order**	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

WANDA K. WOMACK and JESSE W. WOMACK, Guardians, are Petitioners.

Petitioners are the Paternal Grandmother and Step-Grandfather of the minor and were appointed Guardians on 4-3-06.

Father: **JEREMY V. DEEN**
- Served by mail on 2-18-12
Mother: **REBECCA WEGLEY**
- Signed Consent and Waiver of Notice 8-15-11

Paternal Grandfather: Anthony Deen *(Deceased)*
Maternal Grandfather: Robert Wegley
- Signed Consent and Waiver of Notice 8-15-11
Maternal Grandmother: Vanessa McGinnis
- Signed Consent and Waiver of Notice 8-15-11

Siblings: Dalles Childers, Jessica M. Deen

Petitioners state that Anthony has decided he would like to move and live in Louisiana with his grandparents Mike and Vanessa McGinnis. He visits with them every year, and would now like to live with them. Guardians agree and want what is best for Anthony and his happiness.

Vanessa McGinnis, Maternal Grandmother, signed a Consent and Waiver of Notice.

Court Investigator Jennifer Young to provide report.

NEEDS/PROBLEMS/COMMENTS:

Court Investigator to provide report

1. **Need consent and waiver of notice or proof of service of Notice of Hearing pursuant to Probate Code §1460(b)(5) on Minor Anthony V. Deen (age 13).**

Reviewed by: skc

Reviewed on: 4-6-12

Updates:

Recommendation:

File 14 - Deen

Dept. 303, 9:00 a.m. Monday, April 16, 2012

15 Ruth Elizabeth Wedel (Estate) **Case No. 10CEPR00837**

Atty Wall, Cindy L. (Pro Per – Executor – Petitioner)

(1) Waiver of Accounting and (2) Petition for Final Distribution

DOD: 6-28-10			**CINDY L. WALL**, Executor with Full IAEA without bond, is Petitioner. Accounting is waived. I&A: $174,360.50 POH: $174,360.50 ($4,360.50 cash plus real property) Executor: Waived **Distribution pursuant to Decedent's will:** Cindy L. Wall: Entire estate ($4,360.50 cash plus real property)	**NEEDS/PROBLEMS/COMMENTS:** 1. **Petitioner does not address whether notice was given to the Director of Health Care Services pursuant to Probate Code §9202(a).** **If notice was required, but not given, the matter may require continuance for the appropriate time for response.** 2. **Need Order.** 9202(a). Not later than 90 days after the date letters are first issued to a general personal representative, the general personal representative or estate attorney shall give the Director of Health Care Services notice of the decedent's death in the manner provided in Section 215 **if the general personal representative knows or has reason to believe that the decedent received health care under Chapter 7 (commencing with Section 14000) or Chapter 8 (commencing with Section 14200) of Part 3 of Division 9 of the Welfare and Institutions Code, or was the surviving spouse of a person who received that health care.** The director has four months after notice is given in which to file a claim.
	Aff.Sub.Wit.			
✓	**Verified**			
✓	**Inventory**			
✓	**PTC**			
✓	**Not.Cred.**			
N/A	**Notice of Hrg**			
N/A	**Aff.Mail**			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order	X		
	Aff. Posting			**Reviewed by:** skc
	Status Rpt			**Reviewed on:** 4-6-12
	UCCJEA			**Updates:**
	Citation			**Recommendation:**
	FTB Notice			**File 15 - Wedel**

Dept. 303, 9:00 a.m. Monday, April 16, 2012

16 Destyni McCorvey (GUARD/P) **Case No. 12CEPR00034**

Atty Hickson, Linda (pro per Petitioner/maternal grandmother)
Atty Compango, Latonda (pro per Objector/mother)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 12 years DOB: 7/11/1999		
Cont. from 031212		
	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
✓	Notice of Hrg	
✓	Aff.Mail	W/O
	Aff.Pub.	
	Sp.Ntc.	
✓	Pers.Serv.	W/O
✓	Conf. Screen	
✓	Letters	
✓	Duties/Supp	
	Objections	
	Video Receipt	
✓	CI Report	
	9202	
✓	Order	
	Aff. Posting	
	Status Rpt	
✓	UCCJEA	
	Citation	
	FTB Notice	

THERE IS NO TEMPORARY.
Temporary was denied.

LINDA HICKSON, maternal grandmother, is petitioner.

Father: **JOHN McCORVEY**

Mother: **LATONDA COMPAGNO** – *personally served on 1/13/12.*

Paternal grandfather: Not listed
Paternal grandmother: Not listed
Maternal grandfather: Curtis Harper

Petitioner states mom has started using drugs and stealing. Mom is in a domestic violence relationship and Petitioner fears for the safety of the minor.

Objections of mother, Latonda Harper-Compagno filed on 1/19/12 states Linda Hickson will not provide a safe, stable environment for the minor. Ms. Harper-Compagno states she was removed from her for child abuse in Monterey County. Ms. Harper-Compagno states Ms. Hickson is in the process of losing physical custody of her physically challenged daughter.

Court Investigator Jennifer Young's Report filed on 3/5/12

DSS Social Worker Anita Ruiz's Report filed on 3/5/12

NEEDS/PROBLEMS/COMMENTS:

Continued from 3/12/12. Minute order states the Court orders Latonda Compagno to submit to a hair follicle test today through Global. Additionally, the Court orders that a court investigator conduct a further interview of Linda Hickson and Latonda Compagno as well as look into the status of the Voluntary Family Maintenance Services and Latonda Compagno's test results.

1. **Need proof of personal service of the *Notice of Hearing* along with a copy of the *Petition* or *Consent and Waiver of Notice* or Declaration of Due Diligence on:**
   a. **John McCorvey (father) – *proof of service by mail filed on 1/17/12. Probate Code §1511 requires personal service on the father.***
2. **Proof of personal service of the *Notice of Hearing* on Destyni McCorvey (minor) and proof of service by mail on John McCorvey (father) and Curtis Harper (paternal grandfather) do not include the name and address of the person serving the documents and it does not indicate that the *Notice of Hearing* was served with a copy of the petition as required.**
3. **Need proof of service of the Notice of Hearing along with a copy of the petition or consent and waiver of notice or declaration of due diligence on:**
   a. **Paternal grandparents**

Reviewed by: KT
Reviewed on: 3/1/12
Updates:
Recommendation:
File 16 – McCorvey

Dept. 303, 9:00 a.m. Monday, April 16, 2012

Declaration of Latonda Compagno dated 3/29/12 states Linda Hickson continues to go against the court order and has been speaking to Destyni about the court case. Ms. Compango states she has changed her ways and her life.

- Virgil is no longer in the home.
- She doesn't do criminal activities.
- She does not do drugs.
- She is active in Destyni's school.
- She is in outpatient intensive care.
- She is in compliance with VFM and CPS.

Court Investigator Jennifer Young to provide supplemental investigation report.

17 **Dorothy K. Turner (Estate)** **Case No. 12CEPR00040**

Atty **Williams, Anna F. (Pro Per – Daughter – Petitioner)**

Petition for Probate of Will and for Letters Testamentary

DOD: 10-23-11			**ANNA F. WILLIAMS**, Daughter and named Executor without bond, is Petitioner. Full IAEA – ok Will dated 4-8-03 Residence: Fresno Publication: Fresno Bee **Estimated value of estate:** Real property - $240,000.00 Probate Referee: Steven Diebert	**NEEDS/PROBLEMS/COMMENTS:** **<u>Continued from 3-26-12</u>** **All defects have been cured.**
Cont. from 032612				
	Aff.Sub.Wit.			
✔	**Verified**			
	Inventory			
	PTC			
	Not.Cred.			
✔	**Notice of Hrg**			
✔	**Aff.Mail**	W/O		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✔	**Letters**			
✔	**Duties/Supp**			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✔	**Order**			
	Aff. Posting			**Reviewed by:** skc
	Status Rpt			**Reviewed on:** 3-16-12
	UCCJEA			**Updates:**
	Citation			**Recommendation:**
	FTB Notice			**File 17 - Turner**

Dept. 303, 9:00 a.m. Monday, April 16, 2012

18 Valentina Rosemary Martinez (GUARD/P) **Case No. 12CEPR00125**

Atty Duque, Santos Robert (Pro Per – Second Cousin – Petitioner)

Atty Duque, Tara Lynn (Pro Per – Second Cousin - Petitioner

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 3 months		
DOB: 1-11-12		
	Aff.Sub.Wit.	
✔	**Verified**	
	Inventory	
	PTC	
	Not.Cred.	
✔	**Notice of Hrg**	
✔	**Aff.Mail**	W
	Aff.Pub.	
	Sp.Ntc.	
N/A	**Pers.Serv.**	
✔	**Conf. Screen**	
✔	**Letters**	
✔	**Duties/Supp**	
	Objections	
	Video Receipt	
✔	**CI Report**	
✔	**Clearances**	
✔	**Order**	
	Aff. Posting	
	Status Rpt	
✔	**UCCJEA**	
	Citation	
	FTB Notice	

TEMPORARY EXPIRES 4-16-12

SANTOS ROBERT DUQUE and TARA LYNN DUQUE, Maternal Second Cousins, are Petitioners. (Santos is cousin to Grace Martinez, the minor's mother.)

Father: **UNKNOWN**
- *Declaration of Due Diligence filed 2-14-12*

Mother: **GRACE MARTINEZ**
- *Consent and Waiver of Notice filed 2-14-12*

Paternal Grandfather: Unknown
Paternal Grandmother: Unknown
Maternal Grandfather: Armando Martinez
- *Deceased*

Maternal grandmother: Mary Chacon
- *Served by mail 3-26-12*

Petitioners state Valentina needs a loving family that can care for her. Her mother is unstable and mentally unable to care for her, and her father is unknown. If Petitioners had not intervened, Valentina would have been placed in CPS as her mother had three other children taken at birth.

Court Investigator Charlotte Bien filed a report on 3-27-12.

NEEDS/PROBLEMS/COMMENTS:

1. **Petitioners state the mother does not know who the father is. If notice is not excused, need proof of service of Notice of Hearing with a copy of the Petition on Father and Paternal Grandparents pursuant to Probate Code §1511.**

2. **Notice of Hearing was served on Maternal Grandmother Mary Chacon without a copy of the Petition pursuant to Probate Code §1511. The Court may require amended service.**

Reviewed by: skc

Reviewed on: 4-6-12

Updates:

Recommendation:

File 18 - Martinez

Dept. 303, 9:00 a.m. Monday, April 16, 2012

19 Austin Chan (GUARD/P) Case No. 12CEPR00140

Atty Boonmy, Annie (pro per Petitioner/sister)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 13 years DOB: 6/15/1998		
Cont. from		
	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	X
	Aff.Mail	X
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	X
✓	Conf. Screen	
✓	Letters	
✓	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	X
	9202	
✓	Order	
	Aff. Posting	
	Status Rpt	
✓	UCCJEA	
	Citation	
	FTB Notice	

THERE IS NO TEMPORARY.
No temporary was requested.

ANNIE JANET BOONMY, sister, is petitioner.

Father: **VENTHY CHAN**

Mother: **SOPHIN DAMLONG** – *nominates.*

Paternal grandparents: not listed
Maternal grandfather: Ken Damlong – *consents and waives notice.*
Maternal grandmother: Prom Damlong – *consents and waives notice.*

Petitioner states the child needs a guardian due to the fact that neither parent can provide a stable home, medical, dental, etc.

NEEDS/PROBLEMS/COMMENTS:

1. **Need *Notice of Hearing*.**
2. **Need proof of personal service of the *Notice of Hearing* along with a copy of the Petition or *Consent and Waiver of Notice* or *Declaration of Due Diligence* on:**
   a. **Austin Chan (minor, age 13)**
   b. **Venthy Chan (father)**
   c. **Sophin Damlong (mother)** Note: mother has nominated the petitioner but has not signed a waiver of notice.
3. **Need proof of service of the *Notice of Hearing* along with a copy of the Petition or *Consent and Waiver of Notice* or *Declaration of Due Diligence* on:**
   a. **Paternal grandparents**
4. **Petition does not list the names and addresses of the paternal grandparents.**

Court Investigator Jennifer Daniel to provide:

1. **Court Investigator's Report**
2. **Clearances**

Reviewed by: KT
Reviewed on: 4/6/12
Updates:
Recommendation:
File 19 - Chan

Dept. 303, 9:00 a.m. Monday, April 16, 2012

20 Cesar Gomez, Dassy Madrigal, Ashley Zaragoza and Jorge Zaragoza (GUARD/P) Case No. 12CEPR00155

Atty Zaragoza Gomez, Maria De Jesus (pro per Petitioner/maternal aunt)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Cesar age: 16 years DOB: 10/17/1995		
Dassy age: 13 years DOB: 7/20/1998		
Ashley age: 4 years DOB: 6/2/2007		
Jorge age: 2 years DOB: 11/20/2009		
Cont. from		
	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	X
	Aff.Mail	X
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
✓	Conf. Screen	
✓	Letters	
✓	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	X
	9202	
✓	Order	
	Aff. Posting	
	Status Rpt	
✓	UCCJEA	
	Citation	
	FTB Notice	

THERE IS NO TEMPORARY.
No temporary was requested.

MARIA DE JESUS ZARAGOZA GOMEZ, maternal aunt, is petitioner.

Father (Cesar and Ashley): **UNKNOWN** – *Declaration of Due Diligence.*

Father (Dassy): **OMAR MADRIGAL** – *Consents and waives notice.*

Father (Jorge): **JORGE LUIS LOPEZ VASQUEZ**

Mother: **JUANA ZARAGOZA** – *Deceased.*

Paternal grandparents (Cesar and Ashley): Unknown
Paternal grandfather (Dassy): Maximo Mendoza – *consents and waives notice.*
Paternal grandmother (Dassy): Catalina Barajas
Paternal grandparents (Jorge): Unknown
Maternal grandfather: Ricardo Zaragoza – *consents and waives notice.*
Maternal grandmother: Maria G. Gomez – *consents and waives notice.*

Petitioner states the mother is deceased. Petitioner states she needs the guardianship so that she can enroll the children in school and take them to the doctor. The children and their mother lived with Petitioner and she has always helped with their day to day needs.

Objections of JORGE LUIS LOPEZ VASQUEZ, father of Jorge, filed on 3/28/12 states he was not notified that he was the father and was kept from being a part of his son's life. After the mother died he has started to visit with the minor. Father states he is requesting that the guardianship of his son be denied and that the minor be returned to his care. In the alternative he requests that he be able to have his son in his care on a one-week alternating basis. However there is no reason his son should not come to live in his home.

NEEDS/PROBLEMS/COMMENTS:

1. **Need *Notice of Hearing.***
2. **Need proof of service of the *Notice of Hearing* along with a copy of the Petition *or Consent and Waiver of Notice* or *Declaration of Due Diligence* on:**
   a. **Catalina Barajas (Dassy's paternal grandmother)**
   b. **Jorge's paternal grandparents**

Court Investigator Samantha Henson to provide:

1. **Court Investigator's Report**
2. **Clearances**

Reviewed by: KT

Reviewed on: 4/6/12

Updates:

Recommendation:

File 20 – Gomez, Madrigal & Zaragoza

Dept. 303, 9:00 a.m. Monday, April 16, 2012