

(1) First and Final Accounting and Report of Status Administration and Petition Thereof and (2) for Final Distribution

DOD: 8/5/2001	VICTOR W. SIDERS , Administrator with Will Annexed, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Need Amended First and Final Account based on the following:</p> <ol style="list-style-type: none"> Accounting does not comply with Probate Code §1060 et seq. Inventory and appraisal was not signed by the probate referee and does not include any property. Attached to the inventory and appraisal is a summary of account that does not comply with Probate Code §1060. Need Notice of Hearing. Need proof of service of the Notice of Hearing on Brian L. Fox pursuant to his Request for Special Notice filed on 3/10/03. 	
	Account period: 3/21/03 – 12/8/13		
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
			Reviewed by: KT
			Reviewed on: 4/14/14
		Updates:	
		Recommendation:	
		File 1 – Siders	

	KAREN SILVA , mother, was appointed Conservator of the Estate on 11/14/97 with funds in the amount of \$6,000.00 to be deposited into a blocked account.	NEEDS/PROBLEMS/COMMENTS: 1. Order does not comply with Local Rule 2.1.15. Need new order.
	Order approving Fourth Account dated 08/24/2011 dispensed with further accountings.	
Cont. from	Petitioner states: The conservatorship of the estate of Troy Hall, conservatee, is no longer required, because all funds belonging to the estate of the conservatorship have been entirely exhausted through expenditures and disbursements to conservatee.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	An order dispensing with accounts was entered in this Court on 08/25/2011 and monthly allotment amounts have been disbursed to conservatee from the California Bank & Trust until all funds were exhausted. A copy of the last bank statement reflecting the zero balance in the conservatorship estate which statement is dated 12/11/2013 is attached hereto. The conservatee has not been confined in a state hospital in California during the pendency of these proceedings. The conservatee is not receiving or entitled to receive benefits from or through the Veterans Administration. No one has filed a request for special notice.	
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		Reviewed by: LV
<input type="checkbox"/> Status Rpt		Reviewed on: 04/14/2014
<input type="checkbox"/> UCCJEA		Updates:
<input type="checkbox"/> Citation		Recommendation:
<input type="checkbox"/> FTB Notice		File 2 – Hall

3 Virginia Terzian (Estate)

Case No. 13CEPR00738

Atty Baldwin, Kenneth A (for Petitioners Karen Terzian, Katrina Jensen & Kristi Cumming)

(1) First and Final Report of Co- Executors and Petition for Its Settlement and (2) for Statutory Fees Due Attorneys and (3) for Judgment of Final Distribution under Will to Intervivos Trust on Waiver of Accounting

DOD: 2/17/13	KAREN TERZIAN, KATRINA JENSEN and KRISTI CUMMING , Co-Executors, are petitioners.	NEEDS/PROBLEMS/COMMENTS:
	Accounting is waived.	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.	I & A - \$809,166.00	
<input checked="" type="checkbox"/> Verified	POH - \$852,746.64	
<input checked="" type="checkbox"/> Inventory	Executors - waive	
<input checked="" type="checkbox"/> PTC	Attorney (statutory) - \$19,180.00	
<input checked="" type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	Attorney costs - \$1,427.00 (filing fees, publication and recording fees.)	
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.	Distribution of property on hand consisting of real property and cash is to:	
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters	KAREN TERZIAN, KATRINA JENSEN and KRISTI CUMMING as Co-Trustees of the VIRGINIA TERZIAN FAMILY TRUST.	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input checked="" type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 4/14/14
		Updates:
		Recommendation: SUBMITTED
		File 3 – Terzian

4 Raymond Berber (Spousal)

Case No. 14CEPR00060

**Atty Jaymes, William R. (of Palm Desert, for Maria Isabel Lopez de Berber – Spouse – Petitioner)
Spousal or Domestic Partner Property Petition (Prob. C. 13650)**

DOD: 03/16/2013		<p>MARIA ISABEL LOPEZ DE BERBER, surviving spouse, is petitioner.</p> <p>No other proceedings</p> <p>Decedent died intestate</p> <p>Declaration filed 4-1-14 states Petitioner and the decedent were married on 5-29-99 and purchased the real property located at 712 Diaz Street in Firebaugh, CA, during the marriage with community property funds on or about 8-2-02. All of the property that Petitioner is requesting to pass via this Spousal Property Petition was acquired during the marriage with community property funds and was not received by Petitioner or the decedent by gift, devise, or bequest.</p> <p>Petitioner requests Court confirmation of her one-half community property interest in the real property, and a determination that the decedent's one-half community property interest in the real property passes to Petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 04/02/2014</u></p> <p>The following issues remain:</p> <p>1. Petitioner's Declaration filed 4-1-14 states the property was acquired during the marriage with community property funds; however, the attached Grant Deed recorded 8-2-02 indicates that the property was granted to "<u>Raymond Berber, a married man as his sole and separate property.</u>" The Court may require clarification.</p> <p><u>Note:</u> If the real property is determined to be the decedent's separate property, Petitioner as the surviving spouse would be entitled to a one-third share and the remaining two-thirds would pass to the decedent's five (5) children pursuant to intestate succession (Probate Code §6401). If so, an amended petition or revised order reflecting the determination at this hearing may be necessary.</p>
Cont. from 022614, 040214			
<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 type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: LV</p> <p>Reviewed on: 04/14/2014</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 4 – Berber</p>	

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

Age: 70	LISA MUNSEY , daughter, is petitioner and requests appointment as Conservator of the Person with medical consent and dementia powers and appointment as Conservator of the Estate without bond .	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator Advised Rights on 02/27/2014</p> <p>Voting Rights Affected Need Minute Order</p> <ol style="list-style-type: none"> 1. Need Confidential Supplemental Information form – Judicial Council GC-312. 2. Need Dementia Attachment, Judicial Council Form GC-313. <p><u>Continued on additional page</u></p>
Cont. from 032514		
<input type="checkbox"/> Aff.Sub.Wit.	Estimated Value of the Estate:	
<input checked="" type="checkbox"/> Verified	Personal property –	
<input type="checkbox"/> Inventory	Annual Income - \$26,556.00	
<input type="checkbox"/> PTC	(Assuming what is listed is per month not per year)	
<input type="checkbox"/> Not.Cred.	Declaration of Jennifer Lancaster, D.O. filed 02/19/2014 supports request for medical consent and dementia powers.	
<input checked="" type="checkbox"/> Notice of Hrg	Voting Rights Affected	
<input checked="" type="checkbox"/> Aff.Mail	Petitioners states: the proposed conservatee's health has declined rapidly over the last 5 years. She has to be in a climate controlled area due to having an allergy to cold. Her home in Tollhouse that she built does not have central heating. She must be watched at all times because she likes to walk and wander. She cannot speak her needs or say when she is hungry. The proposed conservatee has been diagnosed with severe dementia with severe memory impairment, aphasia, apraxia and impaired function. Unable to perform individual activities of daily living. Intermittent turbelness and visual hallucinations that wax and wane. Petitioner states that the conservatee is not able to speak intelligently and petitioner noticed she was not paying her bills, so she placed the petitioner on her checking account. Proposed conservatee is unable to manage her financial resources or maintain her home.	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" 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 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		
<u>Please see additional page</u>		<p>Reviewed by: LV</p> <p>Reviewed on: 04/14/2014</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 5 – Munsey</p>

Court Investigator Charlotte Bien's report filed 03/05/2014.

Needs / Problems / Comments continued:

3. Petition requests that bond be waived. Probate Code §2320 states except as otherwise provided by statute, every person appointed as conservator shall, before letters are issued, give a bond approved by the court. Probate Code §2321 states Notwithstanding any other provision of the law, the court in a conservatorship proceeding may not waive the filing of a bond or reduce the amount of bond required without a good cause determination by the court that the conservatee will not suffer harm as a result of the waiver or reduction of the bond. **Based on the Annual Income, the personal property listed on the Inventory and Appraisal, and the cost of recovery, the bond should be set at \$61,422.**
4. Petition lists pension in the amount of \$1,222 and SSA at \$991, are these amounts per month or per year? Need clarification.

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

DOD: 6/20/13		ROBERT LEE ADAMS , named alternate executor without bond, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Proposed personal representative is a resident of New Jersey. Probate Code 8571 states notwithstanding a waiver of bond, the court in its discretion may require a nonresident personal representative to give a bond in an amount determined by the court.</p> <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Friday, May 16, 2014 at 9:00 a.m. in Department 303, for the filing of the bond, if required. • Friday, August 15, 2014 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. • Friday, June 12, 2015 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.
		Named executor is deceased.	
Cont. from		Full IAEA – o.k.	
<input type="checkbox"/>	Aff.Sub.Wit.	S/P	
<input checked="" type="checkbox"/>	Verified	Will dated: 6/30/03	
<input type="checkbox"/>	Inventory	Residence: Fresno	
<input type="checkbox"/>	PTC	Publication: Fresno Business Journal	
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen	Probate Referee: Rick Smith	
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
Estimated value of the estate:			
Personal property - \$453,365.00			
Annual income - \$131,419.00			
Total - \$584,784.00			
Reviewed by: KT			
Reviewed on: 4/14/14			
Updates:			
Recommendation:			
File 6 – Edmonds			

7 Timothy Hall (Estate)

Case No. 14CEPR00194

Atty Roberts, Gregory J. (for Petitioner Bruce E. Hall)
Atty Teixeira, J. Stanley (for Objector Gwen Allen)

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

DOD: 1/25/14	BRUCE E. HALL is petitioner and requests that BRUCE E. HALL and GARY J. HALL (brothers) be appointed as Co-Administrators, with full IAEA authority and with bond set at \$400,000.00.	NEEDS/PROBLEMS/COMMENTS:
		A competing Petition for Probate has been filed by Gwen Allen (sister) and is set for hearing on 5/20/14.
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.	Full IAEA – o.k.	
<input checked="" type="checkbox"/> Verified	Decedent died intestate.	For Objector:
<input type="checkbox"/> Inventory		1. Objections state the decedent's death certificate is attached as "Exhibit 1." However, there are no attachments to the objections.
<input type="checkbox"/> PTC	Residence: Fresno Publication: Fresno Business Journal.	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Estimated value of the Estate:	
<input checked="" type="checkbox"/> Aff.Mail W/O	Personal property - \$160,000.00 Real property - \$240,000.00 Total - \$400,000.00	Note: If the petition is granted, status hearings will be set as follows:
<input checked="" type="checkbox"/> Aff.Pub.		<ul style="list-style-type: none"> • Friday, May 16, 2014 at 9:00 a.m. in Department 303, for the filing of the bond. • Friday, August 15, 2014 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. • Friday, June 12, 2015 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Probate Referee: Steven Diebert	
<input type="checkbox"/> Conf. Screen	Objections of Gwen Allen filed on 4/10/14 states she objects to the appointment of Bruce and Gary because they have not been involved in the family and do not know enough about the family. For example, Gary Hall was the informant on the death certificate for Timothy Hall and stated that Timothy's residence was in Menlo Park. Timothy's residence at the time of his death was in Fresno. He also stated the wrong birth date for Timothy. In the Petition filed by Bruce one of Timothy's siblings, Albert Hall, was omitted. Further, Timothy's sister is listed as "Janet Lacey, when in fact her name is Janice Lacey. Ms. Allen states Timothy Hall had her manage all things for him whenever he was away from Fresno. She was Timothy's main contact person.	
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 4/14/14
		Updates:
		Recommendation:
		File 7 – Hall

DOD: 7/18/13	KAREN MAXWELL GRIMES , daughter, is petitioner and requests appointment as Administrator with Will Annexed with full IAEA authority and without bond.	NEEDS/PROBLEMS/COMMENTS: 1. Petition does not include the name and date of death of the deceased spouse. Local Rule 7.1.1D. 2. #5a(3) or 5a(4) of the petition was not answered re: registered domestic partner. 3. #5a(7) or 5a(8) of the petition was not answered re: issue of predeceased child. 4. #8 of the petition does not include the Trustee of the 2004 Helen Maxwell Trust. Note: If the petition is granted, status hearings will be set as follows: <ul style="list-style-type: none"> • Friday, May 16, 2014 at 9:00 a.m. in Department 303, for the filing of the bond. • Friday, August 15, 2014 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. • Friday, June 12, 2015 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. 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.
Cont. from	All heirs waive bond and nominate petitioner.	
<input checked="" type="checkbox"/> Aff.Sub.Wit.	Full IAEA – o.k.	
<input checked="" type="checkbox"/> Verified	Lost Will dated: 10/29/14	
Inventory	Residence: Clovis	
PTC	Publication: Fresno Business Journal	
Not.Cred.	Estimated value of the estate:	
Notice of Hrg	Personal property - \$232,000.00	
<input checked="" type="checkbox"/> Aff.Mail W/	Probate Referee: Rick Smith	
<input checked="" type="checkbox"/> Aff.Pub.	Declaration of Karen Maxwell Grimes dated 3/7/14 states her mother was deaf all of her life and in her later years became a very private person. She had been befriended by a neighbor who forged some of her mother's checks and stole approximately \$40,000.00 from her mother's accounts.	
Sp.Ntc.	Petitioner states she searched through all of her mother's papers and could not find the original will. Petitioner states she has no reason to believe nor was she ever told that her mother destroyed or revoked this will.	
Pers.Serv.		
Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
Reviewed by: KT		
Reviewed on: 4/14/14		
Updates:		
Recommendation:		
File 8 – Maxwell		

DOD: 8/24/14	PRISCILLA GONZALES , daughter, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need name and date of death of deceased spouse. Local Rule 7.1.1D. 2. Petition indicates the decedent's other daughter and intestate heir, Cathy Gallemore stated she did not intend to claim any interest in the property. Cathy Gallemore succeeds to the property. This procedure can only be used if all who succeed to the property join in. Therefore Cathy Gallemore must also be a petitioner.
	40 days since DOD.	
	No other proceedings.	
Cont. from	Decedent died intestate.	
<input type="checkbox"/> Aff.Sub.Wit.	I & A - \$75,000.00	
<input checked="" type="checkbox"/> Verified	Petitioner requests court determination that decedent's 100% interest in real property located in Firebaugh pas to her pursuant to intestate succession.	
<input checked="" type="checkbox"/> Inventory		
<input checked="" type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	W/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<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: 4/15/14
		Updates:
		Recommendation:
		File 9 - Gonzales

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

DOD: 2/24/14		RACHELLE IRELAND , named executor without bond, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Note: There are handwritten changes made to the will. Each change contains the signature of the testator next to them however they are not dated. 1. Judith Stafford, beneficiary and named alternate executor was not listed on #8 of the petition as required. 2. Need proof of service of the Notice of Petition to Administer the Estate on Cheyenne Ireland. Probate Code §8110 and California Rules of Court 7.51(a).
		Full IAEA – o.k.	
		Will dated: 3/12/13	
Cont. from		Residence: Fresno	
<input checked="" type="checkbox"/>	Aff.Sub.Wit.	Publication: Fresno Business Journal	
<input checked="" type="checkbox"/>	Verified		
	Inventory		
	PTC		
	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Estimated value of the estate:	
<input checked="" type="checkbox"/>	Aff.Mail	Personal property - \$ 5,000.00	
<input checked="" type="checkbox"/>	Aff.Pub.	Real property - \$62,476.00	
	Sp.Ntc.	Total - \$67,476.00	
	Pers.Serv.	Probate Referee: Steven Diebert	
	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed by: KT	
		Reviewed on: 4/15/14	
		Updates:	
		Recommendation:	
		File 10 – Stafford	

11 **Joseph Robert McClintic (CONS/PE)**
 Atty **Marshall, Jared (for Colleen Pendergrass – daughter)**
 Atty **Wright, Janet L. (Court Appointed for conservatee)**
 Atty **Thompson, Tim (for Marlene Hubbell – daughter/Objector)**

Case No. 10CEPR01130

Status Hearing Re: Settlement Agreement

Age	COLLEEN PENDERGRASS , daughter, filed a Petition nominating the PUBLIC GUARDIAN as Conservator of the Person and Estate.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	MARLENE HUBBELL , daughter, objected.	
<input type="checkbox"/> Aff.Sub.Wit.	Ongoing litigation has ensued regarding the conservatorship and matters regarding Mr. McClintic's estate.	
<input type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	Minute Order from Settlement Conference dated 03/17/14 states: Mr. Thompson is appearing as counsel for Marlene Hubbell. The Court is informed that the matter has been settled and they are working on the paperwork.	
<input type="checkbox"/> Aff.Mail	The matter was continued to 04/16/14.	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	Status Report filed 04/11/14 states: The parties have been engaged in settlement negotiations since early March of this year. The negotiations were fruitful, and the parties have reached a tentative agreement resolving the underlying dispute. The parties and their respective counsel have approved the language of a formal written settlement agreement.	
<input type="checkbox"/> Letters	Due to the unavailability of counsel, however, the formal written settlement agreement has not been signed by the parties. It is anticipated that the settlement agreement will be fully executed within the next 30 days.	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 04/15/14
		Updates:
		Recommendation:
		File 11 – McClintic

12 Joseph Bawaan, Jr. & Vanessa Bawaan (GUARD/P) Case No.14CEPR00032

Atty Bawaan, Albert James (pro per – paternal grandfather/Petitioner)

Atty Ochoa, Candy Natalie (pro per – paternal grandmother/Petitioner)

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

Joseph, 3	<u>TEMPORARY EXPIRES 03/19/14</u>		NEEDS/PROBLEMS/COMMENTS:
Vanessa, 10 months	ALBERT BAWAAN and CANDY OCHOA, paternal grandparents, are Petitioners.		<p><u>CONTINUED FROM 03/19/14</u> Minute Order from 03/19/14 states: Also present in the courtroom is the maternal grandmother, Lisa Pena. Mother and father object to the guardianship. The Court orders mother and father to meet with Court Investigator JoAnn Morris forthwith. The Court further orders that the mother, father, and the maternal grandmother provide their contact information to the clerk's office. Visitation as to the mother and father to be determined among the parties. The maternal [grandmother?] is ordered not to have any visits with the children or be around while mother and/or father are exercising their visits. Parties are ordered not to speak ill of one another around the children, or make any promises to them regarding this matter. Matter is continued to 04/16/14. The temporary is extended to 04/16/14.</p> <p>1. Need proof of service by mail 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 & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for:</p> <p>a. Lisa Pena (maternal grandmother) b. Paternal grandfather</p>
	Father: JOSEPH DAVID BAWAAN – <i>personally served on 01/26/14</i> Mother: VANESSA NADINE GONZALEZ – <i>personally served on 01/26/14</i>		
Cont. from 031914	Maternal grandmother: LISA PENA Maternal grandfather: NOT LISTED		
<input type="checkbox"/> Aff.Sub.Wit.	Petitioners state that both parents are homeless, drug addicts, and unemployed. There have been two recent acts of violence involving the parents in the past two months that the children witnessed. The father is currently recovering from a brutal beating by the mother's brother that required hospitalization.		
<input checked="" type="checkbox"/> Verified	Court Investigator JoAnn Morris filed a report on 03/07/14.		
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input type="checkbox"/> Aff.Mail	x		
<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 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: JF
			Reviewed on: 04/15/14
			Updates:
			Recommendation:
			File 12 – Bawaan

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

Age: 17	NO TEMPORARY REQUESTED	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Father (Unknown) • Mariela Salazar (Unknown) • Ismael Bracamonte Garcia (Minor) 2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Paternal Grandparents (Unknown) • Maternal Grandparents (Unknown) 3. Page #5 of the Guardianship Petition – Child Information Attachment (GC 210(CA)) which pertains to whether the child has Native American Ancestry was not completed. Need declaration with page #5 attached. 4. UCCJEA is incomplete. Need minor's residence information for the past 5 years
	MARIA DE LOURDES FABIAN , non-relative, is petitioner.	
	Father: UNKNOWN	
	Mother: MARIELA SALAZAR	
	Paternal Grandparents: Unknown	
	Maternal Grandparents: Unknown	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	X	
<input type="checkbox"/> Aff.Mail	X	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	X	
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
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		
	Petitioner states: her son and the minor are friends. Petitioner states that the child is homeless and has no means to support himself, he has been staying with various families since February of last year and was homeless before that. She states that the father is unknown and the mother and the child had been living out of their car. She states that the mother left the child with the father of a school mate. Petitioner states the child needs a stable home where he can finish high school and he needs clothing, food and a family.	
	DSS Social Worker, Irma Ramirez' report filed 04/03/2014.	
	Reviewed by: LV	
	Reviewed on: 04/15/2014	
	Updates:	
	Recommendation:	
	File 13 – Garcia	

15 Daisy A. Morales & Xavier A. Morales (GUARD/P) Case No. 14CEPR00317

Atty Morales, Joe Anthony (pro per – paternal uncle/Petitioner)

Atty Hernandez, Linda C. (pro per – paternal aunt/Petitioner)

Atty Rios, Yolanda Chavez (pro per – paternal aunt)

Atty Butler, R. Frank (for Rita M. Day – maternal grandmother/Competing Petitioner)

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

Daisy, 9	<p><u>TEMPORARY GRANTED EX PARTE:</u> <u>EXPIRES 04/16/14</u></p> <p><u>GENERAL HEARING – 06/04/14</u></p> <p>JOE MORALES and LINDA HERNANDEZ, paternal uncle and aunt, are Petitioners.</p> <p>Father: DAVID MORALES</p> <p>Mother: JACQUELINE GARCIA – deceased</p> <p>Paternal grandfather: ALEJANDRO MORALES – deceased</p> <p>Paternal grandmother: REYNA RIOS – deceased</p> <p>Maternal grandfather: JAIME GARCIA</p> <p>Maternal grandmother: RITA DAY</p> <p>Petitioners allege that the children's mother recently died and their father is currently incarcerated, but is to be released soon. Petitioners request temporary guardianship of the minors in order to be able to provide them with the love and support they need after losing their mother. Petitioners allege that the children have always lived with them or around them and that they are bonded with them.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>A competing Petition was filed by Rita Day, maternal grandmother, and is scheduled for hearing on 04/21/14. The hearing on Ms. Day's general petition is 06/09/14.</p> <p>Note: It appears that Yolanda Rios is a co-petitioner with Joe Morales and Linda Hernandez on their general guardianship petition, but not for the temporary. Only Joe Morales and Linda Hernandez are listed on the temporary petition.</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of personal service of <i>Notice of Hearing</i> at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person or Consent & Waiver of Notice or Declaration of Due Diligence</i> for: - David Morales (father) 3. The Confidential Screening Forms for both petitioners are blank at #8 re: I am/am not aware of any reports alleging any form of child abuse, neglect, or molestation made to any agency charged with protecting children or any other law enforcement agency regarding me or any other person living in my home. 	
Xavier, 9			
Cont. from			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			x
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			x
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
		Reviewed by: JF	
		Reviewed on: 04/15/14	
		Updates:	
		Recommendation:	
		File 15 – Morales	

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

Age: 2 mos.		<u>GENERAL HEARING – 06/09/14</u>		NEEDS/PROBLEMS/COMMENTS:	
		MOSHANAE HILL , maternal aunt, is Petitioner.		4. Need <i>Notice of Hearing</i> .	
		Father: RUSSELL LOWE, JR.		5. Need proof of personal service of <i>Notice of Hearing</i> at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person</i> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for:	
Cont. from		Mother: KENYANNA RICKS – <i>Consent and Waiver of Notice</i> filed 04/07/14		- Russell Lowe, Jr. (father)	
	Aff.Sub.Wit.		Paternal grandfather: UNKNOWN		
✓	Verified		Paternal grandmother: DECEASED		
	Inventory		Maternal grandfather: KENNITH RICKS		
	PTC		Maternal grandmother: DECEASED		
	Not.Cred.				
	Notice of Hrg	x			
	Aff.Mail		Petitioner alleges that the mother is currently using meth and is homeless, therefore Petitioner is stepping in to care for her niece.		
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.	x			
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
				Reviewed by: JF	
				Reviewed on: 04/15/14	
				Updates:	
				Recommendation:	
				File 17 – Lowe	