



## 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.

**Michael William Purkey III (Guardianship)**

**Case No. 02CEPR00364**

Atty Splivalo, Michael N. (for Michael W. Purkey Jr. – Petitioner – Father)

**Petition for Termination of Guardianship**

Age: 14		<p><u>Please see petition for details</u></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order of 03/30/2015:</b> Continued due to notice issue.</p> <p><b>The following issues remain:</b></p> <ol style="list-style-type: none"> <li>1. Need Notice of Hearing.</li> <li>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 Termination of Guardianship or consent and waiver of notice or declaration of due diligence for:                             <ul style="list-style-type: none"> <li>• Pam Esmael (Maternal Grandmother)</li> </ul> </li> </ol>	
Cont. from 033015				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			x
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			n/a
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
		<p><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 04/15/2015</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 1 – Purkey</b></p>		

**Order to Show Cause: Regarding Failure to File the Inventory and Appraisal and for Failure to File a First Account or Petition for Final Distribution**

	<b>LEON Y. GEORGE</b> , father, and <b>ARMEN L. GEORGE</b> , brother, were appointed as Co-Administrators with Full IAEA without bond and Letters issued on 1-25-05.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need Inventory and Appraisal.</li> <li>2. Need First Account or Petition for Final Distribution.</li> </ol>
	Leon Y. George is a resident of Fresno, CA. Armen L. George is a resident of Sammamish, WA.	
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>	The original petition alleged \$200,000.00 in personal property, annual income from personal property of \$5,000.00, and real property valued at \$150,000.00. However, no Inventory and Appraisal was ever filed pursuant to Probate Code §8800.	
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>	Three Creditor's Claims have been filed totaling \$28,426.95, and a Request for Special Notice was filed by the State of California Franchise Tax Board on 11-6-06.	
<b>Pers.Serv.</b>	No accounting or petition for final distribution was ever filed pursuant to Probate Code §12200.	
<b>Conf. Screen</b>	Minute Order of 03/09/2015 set this OSC. Minute Order states: No appearance – The Court issues an Order to Show Cause to Jeffrey Simonian, Leon George, and Armen George as to why the Co-Administrators should not be removed for failure to appear and failure to file the Inventory and Appraisal. Each are order to be personally present in court or to appear via Court Call on 04/20/2015.	
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>	Clerk's Certificate of Mailing and Minute Order sent to Attorney Jeffrey Simonian, Leon George and Armen George on 03/09/2015.	
		<b>Reviewed by:</b> LV
		<b>Reviewed on:</b> 04/15/2015
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 2 - George</b>

Pro Per  
Atty

Gonzalez, Adam (Pro Per Petitioner, father)  
Vezzola, Mark A.; Radoff, Mark A., of Escondido, CA (for Tohono O'odham Nation)

**Petition for Termination of Guardianship**

	<b>ADAM GONZALEZ</b> , father, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Page 3B</b> is the related <i>Petition for Appointment of Guardian</i> of <b>JASMINE GONZALEZ</b> (sibling of Adam and Makayla Gonzalez) filed by Miroslava Ibarra, maternal grandmother.</p> <p><b>Continued from 3/18/2015.</b> Minute Order states the Court wants the legal authority that requires the Court to pay for the copy of the file requested by the Tohono O'odham Nation. Mr. Vezzola is to file his Memorandum of Points and Authorities no later than 4/8/2015. Continued to 4/20/2015 to meet up with the petition for Jasmine Gonzalez.</p> <p><b>Note:</b> Court records show points and authorities has not been filed as of 4/15/2015.</p> <p><b>The following defects from the last hearing remain:</b></p> <ol style="list-style-type: none"> <li>1. <i>Order on Court Fee Waiver</i> filed on 12/5/2014 shows Petitioner's fee waiver request was denied. Therefore, Petitioner owes the <b>\$60.00</b> filing fee for the petition for termination, which Court records indicate has not been paid to date, and Petitioner does not appear to have requested reconsideration of the fee waiver order.</li> <li>2. Need <i>Notice of Hearing</i> and proof of service by mail of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Termination of Guardianship</i>, or <i>Consent to Termination and Waiver of Notice</i> for: <ul style="list-style-type: none"> <li>• Evelyn D. Chavez, mother;</li> <li>• Adam Gonzalez, Ward;</li> <li>• paternal grandfather;</li> <li>• Miroslava Ibarra, maternal grandmother;</li> <li>• <b>TOHONO O'ODHAM INDIAN NATION</b>, the ICWA Tribe of the wards identified in the initial <i>Petition for Guardianship</i> filed 10/12/2005. (<b>Note: Please see Additional Page for Notice of Intervention.</b>)</li> </ul> </li> </ol>
	<b>ALFRED CHAVEZ</b> , maternal grandfather, was appointed Guardian on 4/17/2006.	
Cont. from 020415, 031815	Guardian Alfred Chavez was personally served on 1/6/2015.	
Aff.Sub.Wit.	~Please see Petition for details~	
✓ Verified	<b>Court Investigator's Report</b> was filed 1/27/2015.	
Inventory	<b>Court Investigator's Report</b> was filed on 4/8/2015.	
PTC	<b>Declaration in Opposition to Termination of Guardianship</b> filed by <b>ALFRED CHAVEZ</b> , Guardian, on 2/2/2015.	
Not.Cred.	<b>Tohono O'Odham Nation's Notice of Intervention; Discovery &amp; Disclosure Request; Memorandum of Points &amp; Authorities</b> filed 3/13/2015 requests that the Court provide the Tribe's counsel with copies of all reports and other documents which may be the basis for any decision with respect to the [ <i>Petition for Termination</i> ].	
✓ Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
✓ Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
✓ Objections		
Video Receipt		
✓ CI Report		
✓ Clearances		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<b>Reviewed by:</b> LEG
		<b>Reviewed on:</b> 4/15/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 3A - Gonzalez</b>

Pro Per Ibarra, Miroslava (Pro Per Petitioner, maternal grandmother)

Pro Per Gonzalez, Adam (Pro Per Objector, father)

Atty Vezzola, Mark A.; Radoff, Mark A., of Escondido, CA (for Tohono O'odham Nation)

**Petition for Appointment of Guardian of the Person**

		MIROSLAVA (MARI) IBARRA, maternal grandmother, is petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Page 3A</b> is the related matter of the <i>Petition for Termination of Guardianship</i> of this child's siblings, who have been under Guardianship with <b>ALFRED CHAVEZ</b>, maternal grandfather, having been appointed Guardian on 4/17/2006.</p> <p><b>Note:</b> Minute Order dated 2/18/2015 from the hearing on the temporary petition states the temporary petition is not granted today. The Court orders that the minor is to visit with Miroslava Ibarra, grandmother, every weekend from Friday at 5 p.m. through Sunday at 5 p.m. Ms. Ibarra is to pick the minor up at the start time and Mr. Gonzalez is to pick the minor up at the ending time. The Court also orders that the minor may call to speak with Ms. Ibarra and the minor's siblings daily from 4 p.m. to 5 p.m. Furthermore, no party is to discuss this matter with or in front of the minor, or make any disparaging remarks about each other to or in front of the minor.</p> <p>1. Need proof of <u>personal</u> service of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian</i>, or <i>Consent to Appointment of Guardian and Waiver of Notice</i>, or a <i>Declaration of Due Diligence</i>, for:</p> <ul style="list-style-type: none"> <li>Evelyn Chavez mother.</li> </ul> <p><b>~Please see additional page~</b></p>
		Father: <b>ADAM GONZALEZ</b> ; personally served 2/15/2015.	
		Mother: <b>EVELYN CHAVEZ</b> ; served by mail.	
		<b>~Please see Petition for details~</b>	
		<b>Court Investigator's Report was filed on 4/8/2015.</b>	
Cont. from			
	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/S		
✓	Objections	W / P OS	
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
		<b>Reviewed by:</b> LEG	
		<b>Reviewed on:</b> 4/15/15	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 3B - Gonzalez</b>	

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

2. Need proof of service by mail of the *Notice of Hearing* with a copy of the *Petition for Appointment of Guardian, or Consent to Appointment of Guardian and Waiver of Notice, or a Declaration of Due Diligence*, for:
  - paternal grandfather (*Personal service shows Chevy Gonzalez was served 2/15/15, indicating "Adam's dad"*);
  - Adam Gonzalez, sibling (age 13).
  - Makayla Gonzalez, sibling (age 12).
3. Need *Guardianship Petition – Child Information Attachment* for Jasmine Gonzalez to be filed with the Court.

***Objection to Guardianship* filed by Adam Gonzalez, father, on 2/17/15.**

		See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  Continued from 3-23-15. All relatives have now been served.
<b>Cont from 032315</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input checked="" type="checkbox"/>	<b>Pers.Serv.</b>		
<input 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 checked="" type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		Reviewed by: skc Reviewed on: 3-18-15 Updates: Recommendation: File 4 - Hale	



**Opposition filed 4/6/15 by William Clark, attorney for James Wilkinson, states** after a lengthy trial on this matter before Judge M. Bruce Smith, the Court rendered a judgment in favor of Petitioner James Wilkinson against Respondent Ross Wilkinson and awarded James \$595,284.28 in damages as well as an award of attorney fees and costs. On 12/11/13, Judge M. Bruce Smith granted Petitioner's Motion for Attorney Fees and Costs in the amount of \$286,527.14, which motion was opposed by Respondent's attorneys. Petitioner pursued his rights to collect on said judgment and took necessary procedural steps including proper recording of the judgment with a sister state judgment in the State of Washington where Respondent resides. Petitioner retained Washington counsel and pursued collection. Respondent retained counsel as well to stop collection efforts.

Approx. one year after the Court granted the Motion for Attorney Fees and Costs, Petitioner filed a **Memorandum of Costs After Judgment, Acknowledgment of Credit, and Declaration of Accrued Interest**, which was served on Respondent and his Washington counsel, Thomas Bigsby, on 10/29/14. On 12/19/14, Petitioner submitted an **Ex Parte Application for Amended Judgment** for Costs. The request of \$22,193.63 represented costs and expenses incurred in collection efforts on the judgment. Petitioner acknowledged partial credit and payment of \$150,000.00. The original **Ruling and Order on Petitioner's Motion for Attorney Fees & Costs** was stamped on 12/9/14 with the costs added to the original judgment and initialed by the Court Clerk. Petitioner submitted said **Amended Judgment** on 12/22/14. Upon receipt, Petitioner sent a **Notice of Entry of Amended Judgment** to Respondent and Mr. Bigsby. See attached.

Respondent has improperly brought this alleged Post-Judgment Motion for Order to Show Cause, contrary to California Civil Procedure and law. This is merely a shot in the dark filing requesting numerous remedies and modifications to the Amended Judgment which was properly entered and recorded. Respondent has not complied with California law and this motion should be denied in its entirety.

See Opposition and Declaration in Support of Opposition for further discussion.

Attorney Matlak, Steven M. (for Bruce Bickel – Trustee/Petitioner)

Petition for Settlement of Second Account Current and Report of Trustee: and for Approval of Attorney's Fees and Costs

Age: 11 years	<b>BRUCE D. BICKEL</b> , Trustee of the <b>AIDAN O'CONNOR SPECIAL NEEDS TRUST</b> established 3/20/2012, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> The order establishing the Special Needs Trust dated 03/20/12 authorized the Trustee to receive payments of fees each month at the rate of \$150/hr. but not to exceed \$1,000.00 in any given month. Reimbursement of any excess fees over \$1,000.00 in any given month requires approval of the court. At this time, there is no excess requested from Petitioner. Total trustee fees paid during the account period were \$11,337.93.</p>
	Account period: <b>01/16/13 – 12/31/14</b>	
Cont. from	Accounting - <b>\$269,670.59</b>	
Aff.Sub.Wit.	Beginning POH - <b>\$216,161.89</b>	
✓ Verified	Ending POH - <b>\$247,065.38</b>	
Inventory	Trustee - <b>not requested</b>	
PTC	(see note)	
Not.Cred.	Attorney - <b>\$4,086.50</b> (per Declaration filed 03/03/15, itemized on Exhibit B, for 24.8 hours @ attorney/paralegal rates from \$260 to \$130/hr.; includes \$200 costs)	
✓ Notice of Hrg	Petitioner indicates that Bond is currently posted in the amount of \$271,110.69. Petitioner states that the current bond amount is insufficient and proposes <b>that bond be increased to \$325,682.61.</b>	
✓ Aff.Mail w/	<b>Petitioner prays for an Order:</b>	
Aff.Pub.	1. Approving, allowing and settling the Second Account Current and Report of Trustee, and ratifying, approving and confirming all acts and transactions of the Petitioner as Trustee as set forth in the Petition;	
Sp.Ntc.	2. Directing Trustee to file an additional bond in the amount of \$49,571.92, bringing the total bond posted to \$325,682.61; and	
Pers.Serv.	3. Authorizing the attorney's fees and reimbursement of costs.	
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: 04/16/15
		Updates:
		Recommendation:
		File 6 – O'Connor

Attorney Kruthers, Heather H (for Petitioner Public Guardian)

Attorney Standard, Donna M (for Conservatee)

Petition for Court Authorization to Sell Real Property (Former Residence) and Personal Property of the Estate

		<b>PUBLIC GUARDIAN</b> , Conservator, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>		<b>Petitioner states</b> the conservatorship estate includes real property located in Squaw Valley that was the former residence of the conservatee.	
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b>	W/	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
✓	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
		The conservatee has been residing at Marion Home I (now Mary's Manor) since 2/24/12. It is doubtful he will return to independent living. There are expenses involved with retaining the property, and it would be to his benefit to sell it.	
		Petitioner requests the Court authorize the sale of Conservatee's personal residence and any personal property she no longer needs, so that the proceeds could be utilized to pay for her cost of care.	
		<b>Declaration of Deputy Public Guardian Renee Garcia</b> states that she spoke with the Conservatee and that Conservatee agreed and said that it seemed like a good idea. He then said he would be leaving the facility soon. When asked where he would go he said, "my place in Squaw Valley."	
		<b>Petitioner prays</b> for an order authorizing petitioner to sell Conservatee's real property, upon confirmation of the court, and any personal property that is no longer needed by the conservatee. Petitioner also prays to retain the services of a licensed real estate broker to assist in the sale.	
			<b>Reviewed by:</b> KT
			<b>Reviewed on:</b> 4/15/15
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 7 - Sager</b>

Atty Amador, Catherine A (for former Conservators of the estate and current conservators of the person Manuel Chavez and Susan Chavez-Leon)

Atty Kruthers, Heather (for current Conservator of the estate, Public Guardian)

Fifth Amended First Account and Report of Conservators; Petition for Allowance of Fees to Attorney for Conservators

	<b>MANUEL CHAVEZ</b> , father, and <b>SUSAN CHAVEZ-LEON</b> , sister, Co-Conservators of the Person and Estate, are Petitioners.		<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>Account period: 11/26/12 - 11/30/13</b>		
Cont. from 031615, 031615	Accounting	- \$321,923.66	<p><b>Note:</b> Manual Chavez and Susan Chavez-Leon were removed as Co-Conservators of the Estate and the Public Guardian appointed by minute order dated 12/11/15.</p> <p><b>Declaration of Catherine Amador filed on 4/9/15 potentially correcting issues in the accounting. The declaration requires the examiner to look between two documents to attempt to make sense of the accounting. Need sixth amended accounting so that all information is in one complete document.</b></p> <p>1. Bank account #XXX0433 is a "joint account" the names of Manuel Chavez and Susan Chavez Leon and not the conservatorship. California Rules of Court, Rule 7.1059(b)(6) states the conservator of the estate must keep the money and property of the estate separate from the conservator's or any other persons money or property.</p>
Aff.Sub.Wit.	Beginning POH	- \$238,464.60	
✓ Verified	Ending POH	- \$237,282.98 (\$15,282.98 is cash)	
Inventory	Conservator	- <i>not requested</i>	
PTC	Attorney	- \$6,625.00 <i>(per declaration and itemization, for 25.00 hours (reduced from 36.90 hours) @ \$265.00 per hour;)</i>	
Not.Cred.	Costs	- \$1,035.00 <i>(filing fees, process service fee; certified copies)</i>	
✓ Notice of Hrg	Bond	- \$324,640.00 <i>(sufficient)</i>	
✓ Aff.Mail W/	<b>Petitioner prays for an order:</b>		
Aff.Pub.	<ol style="list-style-type: none"> <li>1. Approving, allowing, and settling the [First] Account and acts of Co-Conservators; and</li> <li>2. Authorizing the Attorney fees and costs advanced to the Conservatorship during the accounting period; and</li> <li>3. Finding that the Conservatee is not able to complete an affidavit of voter registration and is not entitled to vote.</li> </ol>		
Sp.Ntc.	<b>Court Investigator Report filed 9/8/2014</b>		
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
✓ 2620			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
			<b>Reviewed by: KT</b>
			<b>Reviewed on: 4/15/15</b>
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 8 - Chavez</b>

2. Most of the deposits listed in the Receipt schedule do not include the source of the funds as required.
3. Most of the disbursements do not include the nature and purpose of the disbursement as required.
4. There are several disbursement listed with just a question mark (?) that do not state what they are for, including one disbursement on 9/17/13 for \$2,000.00 listed as "cash"
5. Petition asks for attorney fees totaling **\$6,625.00**. Attorney fees appear to include duplication of work by the attorney and the paralegal. For instance billing statement includes time for the attorney to prepare all the pleadings and also for the paralegal to prepare all the pleadings. The billing statement includes .30 hours (\$79.50) for the attorney to prepare the Duties of Conservator. In addition the billing statement also includes paralegal time of .20 (\$5.00) to prepare the same form. The only thing that needs to be prepared on the Duties of Conservator form is the case name and case number. The billing statement also includes time to prepare a Petition for Exclusive Authority to Give Medical Treatment that was filed at the same time as the Petition for Appointment of Conservator. This was an unnecessary petition in that the request can be made in Petition for Appointment of Conservator. The fees also include time for the preparation of the first amended petition.
6. Need proof of service of the Notice of Hearing for the Fifth Amended Account on the current Conservator, Public Guardian.

(1) First and Final Account and Report of Personal Representative, (2) Petition for Settlement, for (3) Allowance of Attorneys' Fees for Ordinary Services, Costs, and for (4) Final Distribution

<b>DOD: 4/14/12</b>	<b>SANTOS PEREZ</b> , Administrator, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>Current bond: \$78,000.00</b>	<b>Continued from 2/23/15. Minute order states Counsel represents that funds have not been received by the County yet. Items one and two of the examiner notes are to be cured; the Court is not inclined to approve the distribution as has been requested.</b>
	Account period: 4/14/12 – 8/21/14	
<b>Conf. from 111014, 011215, 022315</b>	Accounting - <b>\$96,400.00</b>	
<b>Aff.Sub.Wit.</b>	Beginning POH - <b>\$96,400.00</b>	
✓ <b>Verified</b>	Ending POH - <b>\$96,400.00</b>	
✓ <b>Inventory</b>	Administrator - <b>waives</b>	
✓ <b>PTC</b>	Attorney (statutory) - <b>\$3,856.00</b>	
✓ <b>Not.Cred.</b>	Costs - <b>\$1,724.70</b> (filing fees, publication, probate referee, bond, recorder fees and certified copies)	
✓ <b>Notice of Hrg</b>	Creditor: Department of Health Care Services - <b>\$30,826.13</b>	
✓ <b>Aff.Mail</b> W/	<b>Petitioner states</b> he and the decedent lived together in the estate real property since 1987 until decedent's death in 2012. During the time that petitioner resided with decedent on the real property, he paid the mortgage payments each month, the maintenance and upkeep, and the annual property taxes. The decedent and petitioner agreed that petitioner would have a life estate in the property. Petitioner has continued to pay said expenses since the date of death of the decedent. Mike Chavez and Richard Flores, Jr. children of the decedent, executed a Renunciation in Favor of Santos Perez for a Life Estate; Isabel Alvarez and Sylvia Alaniz, daughters of the decedent did not execute such Renunciation.	1. Petition proposes to distribute the 1997 Automobile to Petitioner. Petitioner is not an heir to this estate. Therefore the property should be distributed to the heirs. 2. Petition proposes to distribute the real property subject to a life estate in favor of the petitioner, who is not an heir to this estate. Two of the beneficiaries, Mike Chavez and Richard Flores, Jr. have signed a Renunciation in favor of Petitioner for a life estate in the real property. The other two beneficiaries Isabel Alvarez and Sylvia Alaniz have not agreed the property being distributed subject to a life estate.
<b>Aff.Pub.</b>		<b>Please see additional page</b>
<b>Sp.Ntc.</b>		<b>Reviewed by: KT</b>
<b>Pers.Serv.</b>		<b>Reviewed on: 4/15/15</b>
<b>Conf. Screen</b>		<b>Updates:</b>
✓ <b>Letters</b> 6/18/13		<b>Recommendation:</b>
<b>Duties/Supp</b>		<b>File 9 – Gonzalez</b>
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
✓ <b>9202</b>		
✓ <b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
✓ <b>FTB Notice</b>		
	<b>Please see additional page.</b>	

Petitioner seeks to distribution of a life estate in the real property under the principle of estoppel. The real property will be subject to a lien in favor of the of the Department of Health Care Services of the State of California until the death of Santos Perez, or the sale of the real property, and subject to the lien of Quinlan, Kershaw and Fanucchi, LLP for attorneys' fees and costs with interest at 10% per annum from the date of the order. In addition the property would be distributed subject to a lien in favor of the Department of Health Care Services in the amount of \$30,826.13 with interest accruing at 7% per annum from the date of recording of the Order and subject to a lien in favor of Quinlan, Kershaw and Fanucchi, LLP, for attorney fees and reimbursement of costs of administration.

**Proposed distribution is to:**

- Santos Perez - 1997 Chevy Automobile and a life estate in the real property
- Mike Chavez (son) - 1/4<sup>th</sup> Interest in the real property, subject to the life estate.
- Isabel Alvarez (daughter) - 1/4<sup>th</sup> Interest in the real property, subject to the life estate.
- Richard Flores, Jr. (son) - 1/4<sup>th</sup> Interest in the real property, subject to the life estate.
- Sylvia Alaniz (daughter) - 1/4<sup>th</sup> Interest in the real property, subject to the life estate.

**Declaration of paralegal Charlene Bullock filed on 3/2/15** states on 1/13/15 she had a voice mail message from Bobbie Coleman of the Recovery Section of the Department of Health Care Services. Mr. Coleman advised that the Department had reviewed the First and Final Account, the Order for Final Distribution, and the lien set forth in said document was acceptable to the Department. Ms. Bullock states that her office has filed Orders for Final Distribution in other probate matters wherein a lien to the Department of Health Care Services is set forth therein, and the Department has accepted those orders each time without having filed a formal consent or letter of consent with the Court.

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Petition for Termination of Guardianship

		JENNIFER HOWELL, mother, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Page 10B</b> is the <i>Petition to Fix Residence Outside the State of California</i> filed by Co-Guardians Martin Moore and Amber Moore.</p> <p><b>Continued from 3/23/2015.</b> Minute Order states examiner notes handed in open court; defects remain to be cured.</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li><b>Minute Order dated 2/23/2015</b> states Petitioner is to cure the defect regarding service to Jose Fuentez, father of the minor. The Court orders that the March visitation will begin on the 28<sup>th</sup> at noon and end on the 29<sup>th</sup> at noon and occur at the home of Jennifer Howell, as agreed to by the parties in open court.</li> <li><b>Probate Mediation Agreement</b> signed by Petitioners and Jennifer Howell was filed on 1/5/2015.</li> </ul> <p><b>The following issues from the last hearing remain:</b></p> <ol style="list-style-type: none"> <li>Need <i>Notice of Hearing</i>.</li> <li>Need proof of service by mail of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Termination of Guardianship</i>, or <i>Consent to Termination and Waiver of Notice</i>, or a <i>Declaration of Due Diligence</i>, for:                     <ul style="list-style-type: none"> <li>Martin Moore, Guardian;</li> <li>Amber Moore, Guardian;</li> <li>Jose A. Fuentez, father.</li> </ul> </li> </ol>
		MARTIN E. MOORE and AMBER M. MOORE, paternal grandfather and step-grandmother, were appointed Guardians on 3/19/2013.	
Cont. from 111314, 010515, 022315, 032315		Father: JOSE ALFREDO FUENTEZ	
	Aff.Sub.Wit.		
✓	Verified	Paternal grandmother: Rebecca Fuentez; Declaration of Due Diligence filed 2/19/2015.	
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X Maternal grandfather: Shawn Howell; Declaration of Due Diligence filed 2/19/2015.	
	Aff.Mail	X Maternal grandmother: Karen Kinzel; Declaration of Due Diligence filed 2/19/2015.	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	<b>Petitioner states</b> the minor belongs with her mother and siblings. Petitioner states the guardianship was only to be temporary.	
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections	<b>Declaration containing a letter to the Court from Petitioner JENNIFER HOWELL was filed on 3/19/2015.</b>	
	Video Receipt		
✓	CI Report	Court Investigator's Report was filed 11/5/2014.	
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		<b>Reviewed by:</b> LEG	
		<b>Reviewed on:</b> 4/15/15	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 10A – Fuentez</b>	





<b>DOD: 05/17/2013</b>	<p><b>LOUISE BAKER</b>, was appointed Executor with full IAEA authority without bond on 01/27/2014.</p> <p>Letters issued on 01/28/2014.</p> <p>Minute Order of 01/06/2014 set this status hearing for the filing of the Inventory and Appraisal.</p> <p><b>Former Status Report filed 08/11/2014</b> states Attorney Calhoun failed to transfer over the hearing of 07/01/2014 due to a change in his calendaring. He and the executrix, Louise Baker, have done an extensive search and found that the estate has no property. However, on review of the events leading up to and during the investigation, it was determined that an individual had changed the beneficiary of the decedent's life insurance three days before her death. The case number of the probate has been used in discovery attempts to determine how such action was taken. As can be seen by the decedent's death certificate, Ms. Ello was in the hospital, and had been for over a month prior to her death. Therefore, with the changing of her beneficiary, it does not appear proper.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order 4/2/15:</b> Counsel represents that there are no assets. Furthermore, his client is wheelchair bound and he did not direct her to utilize Court Call today. The Court admonishes that his client is subject to removal and/or surcharge. If the petition to close the estate is not filed, counsel and his client are both ordered to be present or appear via Court Call on 4/20/15.</p> <p><b>As of 4/15/15, nothing further has been filed.</b></p> <p><b>Page B is Status Re: Filing the First Account or Petition for Final Distribution.</b></p> <p>1. Need Inventory and Appraisal or petition to terminate proceedings.</p>
<b>Cont. from 060614, 070114, 081915, 021915, 040215</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: LV / skc</b>
		<b>Reviewed on: 4/15/15</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 12A - Ello</b>

<b>DOD: 5-17-13</b>	<p><b>LOUISE BAKER</b>, Mother, was appointed Executor with Full IAEA without bond on 1-27-14. Letters issued 1-28-14.</p> <p>At hearing on 1-27-14, the Court set this status hearing for the filing of the first account or petition for final distribution.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order 4/2/15:</b> Counsel represents that there are no assets. Furthermore, his client is wheelchair bound and he did not direct her to utilize Court Call today. The Court admonishes that his client is subject to removal and/or surcharge. If the petition to close the estate is not filed, counsel and his client are both ordered to be present or appear via Court Call on 4/20/15.</p> <p><b>2. Need Inventory and Appraisal and first account/petition for final distribution or petition to terminate proceedings.</b></p> <p><b>Note:</b> The original petition estimated the estate to contain personal property valued at \$500,000.00.</p> <p><b>Note:</b> Louise Baker is the sole heir pursuant to the decedent's will dated 12-21-84; however, Letters issued on 1-28-14 and two creditor's claims have been filed totaling \$1,983.54. The estate must be properly closed by noticed petition. See Probate Code §§ 10950 et seq., 11000, 12200.</p>
<b>Cont. from 030615, 040215</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<p><b>Reviewed by:</b> skc</p>	
	<p><b>Reviewed on:</b> 4-15-15</p>	
	<p><b>Updates:</b></p>	
	<p><b>Recommendation:</b></p>	
	<p><b>File 12B - Ello</b></p>	



Status Hearing Re: Filing of the Inventory and Appraisal

<b>DOD: 12-20-13</b>	<b>JOANN DIREDO</b> , Daughter, was appointed Executor with Full IAEA without bond on 7-10-14. Letters issued 7-16-14.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<u>Minute Order 2-23-15</u> : Counsel represents that there are three creditor's claims that need to be resolved before the Inventory and Appraisal can be filed.
	At the hearing on 7-10-14, the Court set this status hearing re: filing of the Inventory and Appraisal.	<u>Note</u> : Three Rejections of Creditor's Claims were filed 3-13-15; however, no Inventory and Appraisal has been filed as of 4-15-15. In addition, a fourth creditor's claim was filed on 2-19-15.
<b>Cont from 121114, 010515, 022315</b>	<b>Status Report filed 12-31-15 states</b> they have recently become aware of a matter of confusion regarding the real property of the estate. Time is needed to research the entities of ownership and the amount of each entities' ownership, and perhaps supplement or correct the final I&A. There is also an issue of rejection of certain creditor claims. They will be ordering a title search on one parcel. Attorney Fanucchi failed to appear for the 12-11-14 hearing because the hearing was not placed on his calendar pursuant to the 7-8-14 Examiner Notes, and the Executrix was not advised of the said date of hearing.	<ol style="list-style-type: none"> <li>1. Need Inventory and Appraisal pursuant to Probate Code §8800.</li> <li>2. A request for Special Notice has been filed by the IRS. The Court may require Notice of Hearing with a copy of any status report to be served on the IRS and all interested parties pursuant to Probate Code §1252.</li> </ol>
<b>Aff.Sub.Wit.</b>		<u>Note</u> : The original petition estimated the estate value at \$1,000,000.00.
<b>Verified</b>		<u>Note</u> : As of 4-15-15, four (4) Creditor's Claims have been filed in this matter, including a claim by the IRS in the amount of \$5,805.17 and a claim by a family member in the amount of \$106,866.46.
<b>Inventory</b>		<b>Reviewed by:</b> skc
<b>PTC</b>		<b>Reviewed on:</b> 4-15-15
<b>Not.Cred.</b>		<b>Updates:</b>
<b>Notice of Hrg</b>		<b>Recommendation:</b>
<b>Aff.Mail</b>		<b>File 14 – DiRedo</b>
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<b>Status Report filed 2-9-15 states</b> counsel obtained a Guarantee of the Chain of Title from Chicago Title Company issued 1-9-15 containing 107 pages. It appears there are questions concerning the exact title owned as to a certain property on Shaw Ave., because of multiple transfers since 1978. Additional time is needed to determine ownership and perhaps request supplement or correction to the Final Inventory and Appraisal. The Executrix has been served with three creditor's claims. Mr. Fanucchi will appear on 2-23-15 and request continuance.	

Atty O'Malley, David T (for Craig R. Hansen – Executor)

Probate Status Hearing re: Filing of the Inventory and Appraisal

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><b><u>OFF CALENDAR.</u></b>  <b><u>Final Inventory and Appraisal was filed 12/29/2014.</u></b></p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 04/15/2015
		Updates:
		Recommendation:
		File 16 - Hansen

Attorney Markeson, Thomas A. (for Petitioner Richard Harris)

(1) First and Final Report; (2) Petition for Approval of First and Final Report on Waiver of Account and for (3) Final Distribution

<b>DOD: 9/21/14</b>	<b>RICHARD HARRIS</b> , Executor, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Accounting is waived.	
	I & A - <b>\$717,000.00</b>	
	POH - <b>\$673,415.75</b>	
<b>Cont. from</b>	Executor - <b>waives</b>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Attorney - <b>\$17,140.00</b> (statutory; to be paid outside of the estate)	
<input checked="" type="checkbox"/> <b>Verified</b>	<b>Distribution, pursuant to Decedent's Will, is to:</b>	
<input checked="" type="checkbox"/> <b>Inventory</b>	<b>Diana Nordstrom</b> - \$70,206.37, ½ interest in real and personal property and 6.25% of Vista Del Monte Limited Partnership.	
<input checked="" type="checkbox"/> <b>PTC</b>	<b>Richard Harris</b> - \$70,206.37, ½ interest in real and personal property and 6.25% of Vista Del Monte Limited Partnership.	
<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> W/		
<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>		
<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>Reviewed by: KT</b>
		<b>Reviewed on: 4/16/15</b>
		<b>Updates:</b>
		<b>Recommendation: SUBMITTED</b>
		<b>File 17 - Harris</b>

See petition for details.			NEEDS/PROBLEMS/COMMENTS: Continued from 3-2-15. As of 4-15-15, nothing further has been filed. The following issues remain:
Cont 030215			<ol style="list-style-type: none"> <li>1. Need Notice of Hearing.</li> <li>2. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on:           <ul style="list-style-type: none"> <li>- Jolean Grimaldo (Mother)</li> <li>- Father of minor</li> </ul> </li> <li>3. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on:           <ul style="list-style-type: none"> <li>- Maternal Grandfather Joe Aragon</li> <li>- Maternal Grandmother Cindy Aragon</li> <li>- Paternal Grandfather</li> <li>- Paternal Grandmother</li> <li>- Siblings age 12 or older: Joshua, Jaylynn, Jordan, and Erin</li> </ul> </li> <li>4. Petitioner's Request to Waive Court Fees was denied on 1-5-15. Therefore, need filing fees of \$285.00 for the temporary and general guardianship petitions.</li> </ol>
	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		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 4-15-15
			Updates:
			Recommendation:
			File 18 - Bachant

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

<b>Age: 8 mos.</b>		<b><u>TEMPORARY EXPIRES 04/20/15</u></b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>ANNETTE IVORY</b> , non-relative, is Petitioner.		<b><u>CONTINUED FROM 03/09/15</u></b>	
		Father: <b>LEONELL MONARES</b> – <i>Personally served on 03/11/15</i>		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:	
<b>Cont. from 030915</b>		Mother: <b>E'VAHNAVA WILLIAMS</b> – <i>Consent &amp; Waiver of Notice filed 01/05/15; Personally served on 03/11/15</i>		a. Paternal grandparents – <i>service by mail sufficient</i>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			b. Maternal grandfather – <i>service by mail sufficient</i>	
<input checked="" type="checkbox"/>	<b>Verified</b>			<b>Note:</b> Proof of service filed 03/23/15 indicates that Margo Monares was served by mail on 03/11/15; however her relationship to the minor is unknown	
<input type="checkbox"/>	<b>Inventory</b>				
<input type="checkbox"/>	<b>PTC</b>	Paternal grandparents: NOT LISTED			
<input type="checkbox"/>	<b>Not.Cred.</b>				
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Maternal grandmother: APRIL STRIGGLES – <i>Personally served on 03/11/15</i>			
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	w/	Maternal grandfather: NOT LISTED		
<input type="checkbox"/>	<b>Aff.Pub.</b>				
<input type="checkbox"/>	<b>Sp.Ntc.</b>	<b>Petitioner states</b> [See Petition for Details].			
<input checked="" type="checkbox"/>	<b>Pers.Serv.</b>	w/	<b>DSS Social Worker Irma Ramirez filed a report on 03/05/15.</b>		
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>				
<input checked="" type="checkbox"/>	<b>Letters</b>				
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>				
<input type="checkbox"/>	<b>Objections</b>				
<input type="checkbox"/>	<b>Video Receipt</b>				
<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>			<b>Reviewed by:</b> JF	
<input type="checkbox"/>	<b>Status Rpt</b>			<b>Reviewed on:</b> 04/15/15	
<input checked="" type="checkbox"/>	<b>UCCJEA</b>			<b>Updates:</b>	
<input type="checkbox"/>	<b>Citation</b>			<b>Recommendation:</b>	
<input type="checkbox"/>	<b>FTB Notice</b>			<b>File 19 - Monares</b>	

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

		See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  Minute Order 3/23/15 states Rosalee Bradshaw, paternal grandmother, needs to be properly served.  Notice of Hearing filed 3/27/15 indicates service mailed to Ms. Bradshaw on 3/26/15.	
Cont from 032315				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			W
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	Clearances			
<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: skc
				Reviewed on: 4/15/15
				Updates:
		Recommendation:		
		File 20 - Thomas		

Atty Hernandez, Margaret (Pro Per – Petitioner – Paternal Grandmother)

Atty Miller, Carmen (Pro Per – Objector – Mother)

Petition for Appointment of Guardian of the Person

		<p><u>Please see petition for details</u></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need Notice of Hearing.</li> <li>2. 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"> <li>• Andrew P. Fuentes, Jr. (Father)</li> <li>• Camie Miller (Mother)</li> </ul> </li> <li>3. 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"> <li>• Andrew P. Fuentes (Paternal Grandfather)- Unless the Court dispenses with notice.</li> </ul> <p><b>Note:</b> Declaration of Due Diligence is incomplete.</p> <ul style="list-style-type: none"> <li>• Maternal Grandmother (Not Listed)</li> </ul> </li> <li>4. UCCJEA is incomplete. Need minor's residence information for the past 5 years.</li> </ol>	
<b>Cont. from</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 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 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			
<p><b>Reviewed by:</b> LV</p>				
<p><b>Reviewed on:</b> 04/15/2015</p>				
<p><b>Updates:</b></p>				
<p><b>Recommendation:</b></p>				
<p><b>File 22 - Fuentes</b></p>				

Atty Howell, Angelette V. (Pro Per Petitioner)

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

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:	
	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			
	DSS Report	x		
	Clearances	x		
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			1. Need DSS Report pursuant to Probate Code §1513(b).	
			2. The relatives were served Notice of Hearing without a copy of the petition as required by Probate Code §1511. The Court may require further service.	
			3. Need proof of service of Notice of Hearing with a copy of the petition pursuant to Probate Code §1511 on the following relatives whose addresses were unknown per the Notice of Hearing filed 3/12/15: - Andrew Cortes (Maternal Grandfather) - Vanessa Alba (Sibling, if age 12 or older)	
			Reviewed by: skc	
			Reviewed on: 4/16/15	
			Updates:	
			Recommendation:	
			File 23A – Alba	

Attorney Dowling, Michael P (for Petitioner Robert Sheakalee)

**Petition for Order Accepting Resignation of Trustee and for Appointment of Successor Trustee; for Order Approving Trustee's Account and Report; and for Discharge of Trustee's Bond**

		<b>ROBERT SHEAKALEE</b> , Trustee, is petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> Generally the fiduciary bond is not released until a receipt of distribution is received by the Successor Trustee.</p>
		Petitioner states he is the duly appointed and acting Trustee of the <b>DONNA SILVA BUNCE TRUST</b> , established under the <b>Donna I. Silva Revocable Family Trust</b> .	
<b>Cont. from</b>		<p>Petitioner was appointed successor trustee by order of this Court dated 5/1/13 (in the Donna I. Silva Revocable Family Trust, case no. 13CEPR00131). Petitioner states he no longer has the time necessary to devote to his duties as Trustee and believes it is best that he resign.</p> <p>Petitioner is bonded in the amount of \$300,000.00 and wishes to be discharged of his bond upon approval of this petition by the Court.</p> <p>The Trust does not contain a provision allowing the currently serving trustee to appoint his successor. Petitioner does not believe that beneficiary, <b>DONNA S. BUNCE</b> will participate in the nomination of a successor.</p> <p><b>FRESNO COUNTY PUBLIC GUARDIAN</b> has agreed to serve as successor Trustee.</p> <p>Petitioner has not taken a fee as Trustee and does not intend to take a fee for his services as Trustee.</p> <p>Petitioner has filed a fiduciary income tax return for 2013 and is in the process of filing a fiduciary return for 2014 and paid the taxes due.</p> <p>Petitioner hereby incorporates the accounting of his acts as Trustee.</p> <p style="text-align: center;"><b>Please see additional page</b></p>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> w/		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 4/16/15</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 24 - Bunce</b></p>

Account period: 5/1/2013 – 12/31/2014

Accounting	-	\$295,067.49
Beginning POH	-	\$133,055.98
Ending POH	-	\$275,506.13

Petitioner requests the court authorize him to retain a reserve of \$25,000.00 from which to pay any taxes or expenses of administration, including attorney and accountant fees after the closing of the account period and pending transfer of the assets of the Trust to the successor Trustee.

**Wherefore Petitioner prays for an Order of this Court that:**

1. The Court order the **FRESNO COUNTY PUBLIC GUARDIAN** be appointed successor Trustee of the Donna Silva Trust;
2. The Court direct Petitioner to distribute the remaining trust assets, after payment of attorney's fees and costs, to the **FRESNO COUNTY PUBLIC GUARDIAN** as successor trustee;
3. The court discharge **ALBERT SHEAKALEE** from his bond with Great American Insurance Company Co.;
4. The Court approve the accounting of Petitioner's acts as Trustee from May 1, 2013 through 12/31/14, including a reserve of \$25,000.00

Atty Lucich, Nicholas L, JR (for Frances Levine – Petitioner – Spouse)

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

<b>DOD: 02/14/2015</b>			<p><b>FRANCES LEVINE</b>, spouse/named Executor without bond, is petitioner.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
			<p>Full IEAE – o.k.</p>	<p><b>Note: If the petition is granted status hearings will be set as follows:</b></p>
<b>Cont. from</b>			<p>Will dated 08/26/2005</p>	<p>• <b>Monday, 08/24/2015 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <b>and</b></p>
	<b>Aff.Sub.Wit.</b>	s/p		
✓	<b>Verified</b>		<p>Residence: Fresno Publication: The Business Journal</p>	<p>• <b>Monday, 06/20/2016 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.</p>
	<b>Inventory</b>			
	<b>PTC</b>		<p><b>Estimated value of the Estate:</b> Real property - \$250,000.00</p>	<p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>		<p>Probate Referee: Steven Diebert</p>	
✓	<b>Aff.Mail</b>	w/		
✓	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
✓	<b>Letters</b>			
✓	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			
			<p><b>Reviewed by:</b> LV</p>	
			<p><b>Reviewed on:</b> 04/15/2015</p>	
			<p><b>Updates:</b></p>	
			<p><b>Recommendation:</b> Submitted</p>	
			<p><b>File</b></p>	





**28 Sally Munoz (CONS/P)**

Case No. 15CEPR00239

Petitioner Valdivia, Sylvia  
 Petition

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

Age:		NEEDS/PROBLEMS/COMMENTS:  <u>OFF CALENDAR</u>  Request for Dismissal filed.
DOD:		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 4/16/15
		Updates:
		Recommendation:
		File 28 - Munoz

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

		See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  Continued from 4/13/15. Nothing further has been filed. The following issues remain:  1. Need Notice of Hearing.  2. 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 pursuant to Probate Code §2250(e) <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Alejandro Ochoa Huitron (Father) - Ora Marie Huitron (Mother)	
Cont from 041315				
<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			
<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 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 checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
Reviewed by: skc				
Reviewed on: 4/15/15				
Updates:				
Recommendation:				
File 29 - Cruz				

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

<b>Age: 6</b>	<b>GENERAL HEARING: 06/03/15</b>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>CONTINUED FROM 04/13/15</b></p> <p>1. Need proof of <b>personal service</b> 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 &amp; Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for Kenneth Loftis (father). <b>Note:</b> Proof of service filed 04/03/15 indicates that Mr. Loftis was served by mail on 04/02/15; however, service by mail is not sufficient.</p>
	<p><b>ROSEMARY GALLEGOS</b> and <b>BENJAMIN GALLEGOS</b>, maternal grandmother and step-grandfather, are Petitioners.</p> <p>Father: <b>KENNETH LOFTIS</b> – Served by mail on 04/02/15; Declaration of Due Diligence filed 04/15/15</p> <p>Mother: <b>SELINA RAMIREZ</b> – Consent &amp; Waiver of Notice filed 04/01/15</p> <p>Paternal grandfather: <b>ARNOLD LOFTIS</b> – Served by mail on 04/02/15</p> <p>Paternal grandmother: <b>DAISY LOFTIS</b> – Served by mail on 04/02/15</p> <p>Maternal grandfather: <b>DECEASED</b></p> <p>Siblings: <b>MARCUS RAMIREZ</b></p> <p><b>Petitioners state</b> [see Petition for Details].</p> <p><b>Declaration of Susan A. Hemb, Attorney for Petitioners in Support of Petition for Appointment of Guardian</b> filed 04/15/15 states: [see File for Details].</p>	
<b>Cont. from 041315</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	w/	
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>	x	
<input checked="" type="checkbox"/> <b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>		
<input checked="" type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input checked="" type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed on:</b> 04/15/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 30 - Loffis</b>