

Probate Status Hearing RE: Filing of an Inventory and Appraisal and Filing of a First or Final Account

DOD: 3/4/1994	TERRY TUCKER was appointed as Executor with full IAEA and without bond on 1/17/1995.	NEEDS/PROBLEMS/COMMENTS: 1. Status Report was not served on all necessary parties. Local Rule 7.5B.
	Letters issued on 1/17/1995.	
	Inventory and Appraisal was due June 1995.	
Cont. from	Creditor's claim filed on 2/14/1995 by Stephens & Bean Chapel in the amount of \$1,160.11.	
Aff.Sub.Wit.	First account or petition for final distribution was due March 1996.	
Verified	Minute Order dated 1/20/16 states the Court orders Terry Tucker removed as Executor and appoints the Public Administrator. Mr. Tucker reports that the home was lost to foreclosure in 1996, but there are vehicles and a business.	
Inventory	Status Report filed on 4/14/16 states the Court appointed the Public Administrator as Successor Administrator. This matter was assigned to Deputy Public Administrator Scott Stacy. He reports the following information:	
PTC	He talked to him on the phone approximately four times, one of which while he was in the hospital. He arranged for him to come to the Public Administrator's Office about three weeks ago, but he did not show up and he has not been able to contact him since. He has left a couple of messages for him. He has not be able to get him to turn over anything that he did regarding the estate prior to his removal. He doesn't know what assets there may be in the estate due to the former administrator's lack of cooperation.	
Not.Cred.	The Public Administrator does not have any information with which to file an Inventory and Appraisal or final account.	
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: 4/14/16
		Updates:
		Recommendation:
		File 1- Tucker

Attorney Jeffrey B. Pape (for Petitioner Hellen K. Davis, Trust Beneficiary)
Attorney Matthew C. Wagner (for Respondent Patricia Vaughn, Successor Trustee)

Probate Status Hearing Re: Settlement Agreement

Table with columns for case details, status, and needs/problems/comments. Includes rows for DOD, Cont. from 030916, 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, and Needs/Problems/Comments.

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

	PUBLIC GUARDIAN is		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>OFF CALENDAR. Amended petition filed and set for hearing on 5/31/16.</p> <p>Reviewed by: KT</p> <p>Reviewed on: 4/14/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 3- Sager</p>
	Conservator/petitioner.		
	Sale price	- \$130,000.00	
	Overbid	- 137,000.00	
Cont. from 040416			
	Aff.Sub.Wit.	Reappraisal - \$140,000.00	
✓	Verified		
	Inventory	Property - 47409	
	PTC	Thunderhill Lane, Squaw Valley, CA	
	Not.Cred.	Publication - Business	
✓	Notice of Hrg	Journal	
✓	Aff.Mail	W/ Buyers - Mark Freeman, as	
✓	Aff.Pub.	a single man as his sole and separate	
	Sp.Ntc.	property.	
	Pers.Serv.	Broker - \$6,500.00 (5%	
	Conf. Screen	- payable 50% to Jeff Starbuck of	
	Letters	Guarantee Realty and 50% to Brenda	
	Duties/Supp	McReynolds of Century 21- Watson	
	Objections	Realty.	
	Video Receipt		
	CI Report		
	9202		
✓	Order		
✓	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

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Petitioner prays for an order:

1. Approving, allowing and settling the Second and Final Account;
2. Authorizing the conservator and attorney fees and commissions;
3. Authorizing payment of the bond fee;
4. Authorizing Petitioner to sell the personal property as described above and distribute the proceeds;
5. Authorizing distribution of the balance of the property on hand as set forth above; and
6. In the event the whereabouts of the heirs are not known, authorizing Petitioner to deposit any remaining balance of funds with the Fresno County Treasury pursuant to Probate Code §11850(a); and
7. Any other orders the Court considers proper.

Note: Order Authorizing Sale of Personal Property was entered 2/10/16.

Amended First and Final Account and Report of Executor and Petition for Its Settlement, for Allowance of Compensation to Executor and Attorneys for Ordinary Services and for Final Distribution

DOD: 7/4/12	WILLIAM MARTIN (MARTY) SHIBA , Executor with Full IAEA without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 7/4/12 through 5/15/15	<u>SEE PAGE 2</u>
	Accounting: \$74,985.35	
	Beginning POH: \$70,121.84	
	Ending POH: \$10,189.30	
<input type="checkbox"/> Aff.Sub.Wit.	Executor (Statutory): \$2,859.41	
<input checked="" type="checkbox"/> Verified	Attorney (Statutory): \$2,859.41	
<input checked="" type="checkbox"/> Inventory	(\$1,429.70 each to Dean Hiyama and G. L. Motsenbocker)	
<input checked="" type="checkbox"/> PTC	Closing: \$1,500.00	
<input checked="" type="checkbox"/> Not.Cred.	Petitioner states the Dept. of Health Care Services filed a claim against the estate in the amount of \$605,715.67. Separate from this proceeding, DHCS also submitted a claim to the trustee of the Shiba Family Trust in the same amount. Through negotiations between Petitioner's former attorney G.L. Motsenbocker and DHCS, DHCS took the position that 1/2 of the trust assets were the property of the decedent, and payment was issued to DHCS from the trustee in the amount of \$110,146.25. DHCS acknowledged this payment. The current balance due on the claim, as acknowledged in the letter, is \$495,569.42.	
<input checked="" type="checkbox"/> Notice of Hrg	Petitioner states after payment of fees, costs and reimbursement of costs and expenses, there will be one creditor's claim from the Dept. of Healthcare Services with a balance remaining of \$495,569.42. The funds in the estate will be exhausted with an outstanding balance due to the creditor.	
<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 checked="" type="checkbox"/> Letters		
<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		
	Therefore, Petitioner requests distribution as follows:	
	<u>SEE PAGE 2</u>	
		Reviewed by: skc
		Reviewed on: 4/15/16
		Updates: 4/18/16
		Recommendation:
		File 7- Shiba

Page 2

To DHCS: \$2,970.48, with the first ~~\$492,548.94~~ \$483,748.34 (per Settlement Agreement) of any other thereafter discovered property until the claim is satisfied in full. Thereafter, any property not now known to be distributed $\frac{1}{4}$ shares to the heirs, Patricia Kiefer, William Martin Shiba, Kristine Shiba, and Virginia Young.

Note: Examiner Notes requested clarification, as prior status reports indicated settlement with DHCS, but this amended petition did not indicate whether settlement had occurred.

Status Report filed 4/18/16 states since the last hearing, a settlement was reached with the Dept. of Health Care Services. Attached is a copy signed by both parties and their representatives. Per the settlement agreement, DHCS agrees to the payment amount of \$11,821.09, of which \$8,850.61 has already been paid by the Shiba Family Trust and the remaining \$2,970.48 will be payable upon approval of this amended account. The settlement agreement indicates that if additional assets are received, DHCS will receive payment of the value within 90 days of recovery, until the remaining claim of \$483,748.34 is paid in full.

Note: Examiner has interlineated the proposed order to reflect the updated amount of \$483,748.34 per the settlement agreement.

Probate Status Hearing RE: Filing of the Inventory and Appraisal

	<p>SHELIA STEARNS was appointed Conservator of the Person and Estate with bond of \$50,000.00 and \$425,000.00 to be placed into blocked accounts pursuant to Evidentiary/Settlement Conference Minute Order dated 2-25-14. The Order was signed on 3-5-14.</p> <p>Ms. Stearns was formerly represented by Attorney Sheldon Feigel, who is no longer eligible to practice law. Mr. Rindlisbacher appeared for the conservator on 7-21-14.</p> <p>On 8-13-14, bond of \$50,000.00 was filed. Thereafter, Letters were issued on 8-25-14.</p> <p>At a Status Hearing on 01/29/15, the Court set this matter for a status hearing regarding filing of the Inventory & Appraisal.</p> <p>Order Increasing Bond filed 06/26/15, increased bond to \$373,717.86.</p> <p>Bond of \$373,718.00 filed 09/08/15.</p> <p>Inventory & Appraisal, partial no. 1, filed 10/28/15 - \$429,743.51</p> <p>Petition for Authority to Sell Residence of Conservatee was approved on 12/14/15. Minute Order from 12/14/15 [Judge Snauffer] states: Counsel represents that he should have the Inventory & Appraisal back in the next couple of weeks. The Court grants the petition with the condition that the property is to be inventoried and appraised by the previously set 01/13/16 status hearing.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 2/24/16. Minute order states Counsel represents he misplaced the signature pages of the inventory and appraisal and that his client needs to sign, and that there are two properties that need to be appraised. He requests 45 days.</p> <p>1. Need Final Inventory & Appraisal and/or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Cont. from 040215, 052815, 062515, 072315, 090315, 091015, 102915, 011316, 022416		
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		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 4/15/16
		Updates:
		Recommendation:
		File 8A - Cook

Probate Status Hearing Re: Filing of the First Account

	SHELIA STEARNS was appointed Conservator of the Person and Estate with bond of \$50,000.00 and \$425,000.00 to be placed into blocked accounts pursuant to Evidentiary/Settlement Conference Minute Order dated 2-25-14. The Order was signed on 3-5-14.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 2/24/16. Minute order states Counsel represents he misplaced the signature pages of the inventory and appraisal and that his client needs to sign, and that there are two properties that need to be appraised. He requests 45 days.</p> <p>1. Need First Account or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Cont. from 102915, 011316, 022416	Ms. Stearns was formerly represented by Attorney Sheldon Feigel, who is no longer eligible to practice law. Mr. Rindlisbacher appeared for the conservator on 7-21-14.	
Aff.Sub.Wit.	On 8-13-14, bond of \$50,000.00 was filed. Thereafter, Letters were issued on 8-25-14.	
Verified	At a Status Hearing on 01/29/15, the Court set this matter for a status hearing regarding filing of the Inventory & Appraisal.	
Inventory	Order Increasing Bond filed 06/26/15, increased bond to \$373,717.86.	
PTC	Bond of \$373,718.00 filed 09/08/15.	
Not.Cred.	Inventory & Appraisal, partial no. 1, filed 10/28/15 - \$429,743.51	
Notice of Hrg	Petition for Authority to Sell Residence of Conservatee was approved on 12/14/15. Minute Order from 12/14/15 [Judge Snauffer] states: Counsel represents that he should have the Inventory & Appraisal back in the next couple of weeks. The Court grants the petition with the condition that the property is to be inventoried and appraised by the previously set 01/13/16 status hearing.	
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		
		<p>Reviewed by: KT</p> <p>Reviewed on: 4/15/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 8B – Cook</p>

Report of Administrators and Petition for Its Settlement, For Allowance of Statutory Fees and Reimbursement of Costs, and for Final Distribution on Waiver of Accounting

DOD: 1/12/2014		<p>LORENE MOORE and CHARLTON MOORE, co-administrators and sole two beneficiaries of estate, are petitioners</p> <p>Accounting is waived</p> <p>I & A - \$543,806.99</p> <p>POH - \$356,049.06 (\$204,047.46 is cash)</p> <p>Co administrators - waived</p> <p>Costs (L. Moore) - \$8,839.75*</p> <p>Costs (C. Moore) - \$3,331.18*</p> <p>* Co-administrators have not been able to agree on their reimbursements and request court determination as to which respective expenses should be expenses of the estate and reimbursed from the estate. Any amounts not approved by the court will be added in equal shares to the cash distribution to petitioners.</p> <p>Attorneys - \$13,876.14 (greater than statutory – see Note 1)</p> <p>Costs - \$1,941.75 (filing fee, probate referee, publication, certified copies)</p> <p>Closing - \$4,000.00</p> <p>Petitioner is further requesting to take actions necessary and reasonably available to cancel, close and/or remove decedent’s name from any still remaining financial and other accounts in decedent’s name or which reflects the decedent as an account holder or is still associated with the decedent as an account holder or owner.</p> <p><i>See additional page.</i></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Statutory fees are calculated on an I&A value of \$543,806.99 (per Exhibit IV of petition). However, the petitioner reports that decedent's real property was sold for a \$30,000 loss. Therefore, it appears statutory fees should be calculated on an estate value of \$513,806.99 and should be: \$13,276.14 (versus \$13,876.14).</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<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 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		
		<p>Reviewed by: SEF</p> <p>Reviewed on: 4/15/16</p> <p>Updates:</p> <p>Recommendation: File 9- Moore</p>	

Page 2

Distribution, pursuant to intestate succession, is to:

Charlton Moore - \$86,029.32 and 50% interest of non-cash assets including Merrill Edge account security and Wells Fargo Advisor account/securities

Lorene Moore - \$86,029.32 and 50% interest of non-cash assets including Merrill Edge account security and Wells Fargo Advisor account/securities

Declaration filed 4/13/16 by Lorene Moore opposes certain expenses claimed by Co-Administrator Charlton Moore as follows:

- Expenses for flowers at decedent's funeral (\$670.71). Petitioner states her brother told her that his wife's family provided and gifted all the flowers. Petitioner was advised by her brother that he paid for most of the funeral expenses with funds in a joint account he had with decedent. However, he apparently did not pay or reimburse the expense of the flowers from that joint account, she assumes because they were a gift. If the flowers were a gift, she does not believe it appropriate for the estate to now reimburse or pay her brother for that cost.
- Expenses associated with care of decedent's dog (\$930.13). Petitioner does not believe the expenses incurred were reasonable or necessary and were incurred in connection with his plan of placing the dog up for adoption by others, when she had indicated she would take and care for the dog.
- Funeral lunch/dinner (\$587.88). At the reception, petitioner states her brother indicated that he was paying for the meal. Subsequently, he reimbursed himself for other funeral expenses from a joint account he had with decedent, but apparently did not reimburse this expense, she assumes because he intended to pay the cost himself. She does not believe reimbursement from the estate is now appropriate.

Probate Status Hearing Re: Filing of Receipt for Blocked Account

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>OFF CALENDAR. Receipt for Blocked Account filed on 4/11/16.</p>
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input type="checkbox"/>	Pers.Serv.	
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: KT
		Reviewed on: 4/15/16
		Updates:
		Recommendation:
		File 10- Yoshioka

Guardian Melinda C. Simental (Pro Per, mother)

Probate Status Hearing Re: Filing First Account of Guardianship Estate

		<p>MELINDA C. SIMENTAL, mother, was appointed Guardian of the Estate on 11/19/2014.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need first account of the Guardianship Estate, or a verified status report and proof of service of notice of the status hearing with a copy of the status report to all interested parties pursuant to Local Rule 7.5(B).</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: LEG	
		Reviewed on: 4/15/16	
		Updates:	
		Recommendation:	
		File 11- Simental	

Probate Status Hearing RE: Filing of the Inventory and Appraisal

DOD: 4/15/15	<p>BRAD JACOBSON was appointed Administrator with full IAEA and without bond on 7/6/15.</p> <p>Letters issued 7/8/15.</p> <p>Inventory and Appraisal filed on 10/15/15 showing a value of \$305,000.00.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>OFF CALENDAR. Inventory and appraisal filed on 4/14/16.</p>
Cont. from 120915, 012716		
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		
		<p>Reviewed by: KT</p> <p>Reviewed on: 4/14/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 12 – Craig</p>

Probate Status Hearing RE: Filing of the Inventory and Appraisal

	MANUEL AVLIA MENDOZA was appointed guardian of the person and estate on 12/17/15.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need inventory and appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
	Manuel's spouse LIDIA AGUIRRE , was appointed co-guardian of the person and estate on 3/28/16.	
Cont. from	Minute order dated 12/17/15 set this status hearing for the filing of the inventory and appraisal.	
Aff.Sub.Wit.	Note: Order granting the guardianship ordered all funds into a blocked account. Receipt for blocked account has not been filed. Minute order dated 2/3/16 (status hearing for receipt for blocked account) stated there have been no funds received due to the workers compensation case. The status hearing on the blocked account was continued to 12/7/16.	
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: 4/15/16
		Updates:
		Recommendation:
		File 13- Avila

Probate Status Hearing RE: Filing of the Inventory and Appraisal

	MANUEL AVLIA MENDOZA was appointed guardian of the person and estate on 12/17/15.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>2. Need inventory and appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
	Manuel's spouse LIDIA AGUIRRE , was appointed co-guardian of the person and estate on 3/28/16.	
Cont. from	Minute order dated 12/17/15 set this status hearing for the filing of the inventory and appraisal.	
Aff.Sub.Wit.	Note: Order granting the guardianship ordered all funds into a blocked account. Receipt for blocked account has not been filed. Minute order dated 2/3/16 (status hearing for receipt for blocked account) stated there have been no funds received due to the workers compensation case. The status hearing on the blocked account was continued to 12/7/16.	
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: 4/15/16
		Updates:
		Recommendation:
		File 14- Avila

Probate Status Hearing RE: Filing of the Inventory and Appraisal

	ALICE SAMPLE was appointed Conservator of the person and estate with bond set at \$39,000.00 on 12/16/15.	NEEDS/PROBLEMS/COMMENTS: Note: Because Letters did not issue until 3/2/16 the inventory and appraisal is not due until July 2016.
Cont. from		
Aff.Sub.Wit.	The Order was amended on 2/17/16 ordering bond to be set at \$48,400.00.	
Verified		
Inventory		
PTC		
Not.Cred.	Bond of \$48,400.00 was filed on 2/29/16.	
Notice of Hrg	Letters issued on 3/2/16.	
Aff.Mail		
Aff.Pub.	Minute order dated 12/16/15 set this status hearing for the filing of the inventory and appraisal.	
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: 4/15/16
		Updates:
		Recommendation:
		File 15- Sample

Probate Status Hearing RE: Filing of the Bond

Age:			NEEDS/PROBLEMS/COMMENTS:
DOD:			
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		OFF CALENDAR. Bond filed on 3/28/16	
		Reviewed by: KT	
		Reviewed on: 4/15/16	
		Updates:	
		Recommendation:	
		File 16- Salazar	

Petition for Appointment of Probate Conservator of the Person

See petition for details.			<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator advised rights on 2/1/16</p> <p>Voting rights affected – need minute order.</p> <p><u>Minute Order 2/10/16:</u> Petitioner represents that CVRC has agreed to have the capacity declaration completed by an appropriate person.</p> <p><u>Note:</u> An additional Capacity Declaration has now been filed. All issues have now been cured.</p>
Cont. from 021016, 031616			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
✓	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 4/14/16
			Updates: 4/15/15
			Recommendation:
			File 17- Hernandez

Probate Status Hearing RE: Filing of the Bond

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>OFF CALENDAR. Bond filed on 3/29/16.</p>
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input type="checkbox"/>	Pers.Serv.	
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: KT
		Reviewed on: 4/15/16
		Updates:
		Recommendation:
		File 18- Williams

DOD: 07/11/2010	<p>JOYCE VERMILLION, daughter-in-law, and wife of decedent's son, Michael Vermillion, petitions on behalf of Michael Vermillion to be appointed as Administrator with bond set at \$200,000.00.</p> <p>Petitioner resides in Washington.</p> <p>Full IAEA – o.k.</p> <p>Decedent died intestate</p> <p>Residence: Sanger Publication: The Sanger Herald</p> <p>Estimated value of the Estate: Real property - \$200,000.00</p> <p>Probate Referee: Rick Smith</p> <p>Petitioner states: the decedent died intestate on 07/11/2010. Since her death, her son James, has resided in the decedent's home. More than 5 years have passed since Decedent's death. Her son, Michael Vermillion no longer has capacity and is unable to petition for the appointment of a personal representative. The decedent's other two children have been unwilling to deal with the administration of the estate and neither has filed a petition for the appointment of personal representative. Petitioner, the spouse of Michael Vermillion and also his attorney in fact under a general power of attorney, a copy of which is attached, therefore petitions on behalf of her husband, an heir of the estate, to be appointed the administrator.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR.</u> <u>Order signed 04/07/2016.</u></p> <p>Note: Receipt of Bond filed 02/18/2016 in the amount of \$200,000.00.</p> <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Wednesday, 08/03/2016 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Wednesday, 05/03/2017 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <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>
Cont. from 030216		
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		
<p>Reviewed by: LV</p> <p>Reviewed on: 04/11/2016</p> <p>Updates:</p> <p>Recommendation: File 19- Vermillion</p>		

Petitioner Floresa Winchester-Wagner (Pro Per, granddaughter)

Attorney Marvin T. Helon (Court-appointed for proposed Conservatee)

Petition for Appointment of Probate Conservator

		TEMPORARY DENIED	<p>FLORESA WINCHESTER-WAGNER, granddaughter, is Petitioner and requests appointment as Conservator of the Person.</p> <p>Petitioner requests medical consent powers and dementia powers, per Petitioner filing on 3/21/2016 a document entitled <i>Corrections to Petition for Appointment of Probate Conservator</i> filed 3/10/2016.</p> <p style="text-align: center;">~Please see Petition for details~</p> <p>Court Investigator's Report was filed on 4/13/2016.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Petitioner filed on 3/21/2016 a <i>Corrections to Petition for Appointment of Probate Conservator</i> filed 3/10/2016, indicating that Item 1(k) of the <i>Petition</i> should be marked to request orders relating to dementia placement or treatment. Since dementia powers are requested, need the mandatory-use <i>Attachment Requesting Special Orders Regarding Dementia</i> (Judicial Council form GC-313.) <i>Capacity Declaration</i> of Ajit Singh Khaira, M.D., filed 3/18/2016 is incomplete and <u>does not support</u> the request for dementia powers nor for medical consent powers. Need <i>Medical Capacity Declaration</i> (Judicial Council form GC-335) in support of Petitioner's request pursuant to Probate Code § 1890(c). Item 11 of the <i>Petition</i> does not but should list the names, relationships, and addresses of the following relatives of the proposed Conservatee, who are listed on the <i>Proof of Service by Mail</i> filed 3/18/2016: JERRY THOMPSON, son; and MICHAEL WOODS, son. (Petitioner need not amend the <i>Petition</i> to cure this defect; a declaration will suffice.)
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W/		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
✓	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
			<p>Reviewed by: LEG</p> <p>Reviewed on: 4/15/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 20- Grant</p>	

Petitioner Sandra N. Calderon (Pro Per, mother)

Petitioner Ruben Calderon (Pro Per, father)

Petition for Appointment of Probate Conservator

Age: 23 years	<p align="center">NO TEMPORARY REQUESTED</p> <p>SANDRA CALDERON and RUBEN P. CALDERON, parents, are Petitioners.</p> <p align="center"><i>~Please see Petition for details~</i></p> <p>Court Investigator's Report was filed on 4/12/2016.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
DOB: 12/16/1992			
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail			W /
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input checked="" type="checkbox"/> Pers.Serv.			
<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			
		Reviewed by: LEG	
		Reviewed on: 4/15/16	
		Updates:	
		Recommendation:	
		File 22- Calderon	

Petition for Appointment of Temporary Guardian of the Person

		GENERAL HEARING 6/13/16	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Local Rule 7.15.7 states a Petition for Appointment of a Guardian of a minor will not ordinarily be considered if a matter of custody of a child is currently pending in the Family Law Court. It appears that the Family Court has jurisdiction of this matter. Need Notice of Hearing. (Note: A proof of service has been filed showing service of the Notice of Hearing however the actual Notice of Hearing has not been filed. Orders are incomplete at #4a. Need new completed orders.
		PATRICIA NUNEZ , paternal grandmother, is petitioner.	
		Please see petition for details.	
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W/	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: KT
			Reviewed on: 4/15/16
			Updates:
			Recommendation:
			File 23- Martinez

24
 Petitioner
 Attorney

Eulalia Martinez Rosales (CONS/P)
 Camacho, Rosalba (Pro Per – Daughter – Petitioner)
 LeVan, Nancy J. (Court appointed for Proposed Conservatee)

Case No. 16CEPR00109

Petition for Appointment of Probate Conservator of the Person

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 2/22/16 Voting rights affected – need minute order <u>Minute Order 4/13/16:</u> Continued due to the defects listed in the notes; Court appointed counsel unable to be present today. The following issue remains noted: 1. The Capacity Declaration does not address dementia medication powers; only dementia placement. The Court may require clarification or revised capacity declaration.	
Cont. from 030216, 041316				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			w
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input checked="" type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input checked="" type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		Reviewed by: skc		
		Reviewed on: 4/14/16		
		Updates:		
		Recommendation:		
		File 24- Rosales		

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under the IAEA

DOD: 5/31/15		LESTER M. PIECZONKA, Named Executor without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Petitioner is a resident of Wyckoff, New Jersey.	<u>OFF CALENDAR</u>
Cont. from 041316		Full IAEA – ok	Order Signed 4/14/16.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		Note: The Court will set status hearings as follows:
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		<ul style="list-style-type: none"> • Wednesday, September 14, 2016 for filing the Inventory and Appraisal • Wednesday, June 14, 2017 for filing the first account or petition for final distribution.
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		Notice of status hearing setting will be mailed to Attorney Flanigan.
<input checked="" type="checkbox"/>	Aff.Mail	w	
<input checked="" type="checkbox"/>	Aff.Pub.		Reviewed by: skc Reviewed on: 4/18/16 Updates: Recommendation: File 25- Amico
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input 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		