

**(1) First and Final Report of Administrator, (2) Petition for Statutory Compensation to Attorney and (3) for Final Distribution on Waiver of Accounting**

<b>DOD: 9-3-05</b>		<b>DAN P. DRISCOLL</b> , Administrator with Full IAEA without bond, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Letters issued to the Administrator, represented by Attorney Knudson, in March 2006. I&amp;A was not filed until December 2008, and thereafter there was no activity in this matter until the Court set the matter for hearing regarding failure to file a petition for final distribution.</p> <p>The Administrator waives compensation; however, Attorney Knudson requests the full amount of statutory compensation.</p> <p>This petition does not provide any explanation for the delays in administration (two years to file I&amp;A as opposed to the four months prescribed by code) and closing the estate (eight years as opposed to the one prescribed by code).</p> <p>Probate Code §§ 8800, 12205.</p>
		Accounting is waived.	
		I&A: \$293,876.21	
		POH: \$260,472.37 cash plus the '99 Mercury Sable and the '94 Sierra Travel Trailer (See I&A values)	
	<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>	3-21-06	
	<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>	N/A	
		<p>Administrator (Statutory): Waived  Administrator (Extraordinary): Petitioner waives extraordinary compensation for the sale of the real property</p> <p>Attorney (Statutory): \$8,8772.52</p> <p>Attorney (Extraordinary): Attorney waives waives extraordinary compensation for legal services provided in connection with the sale of the real property</p> <p>Costs: \$1,402.35 (Reimburse \$600.00 to Petitioner and \$802.35 to attorney for filing, certified letters, appraisal)</p> <p>Closing: \$1,692.50</p> <p><b>Distribution pursuant to intestate succession:</b></p> <p>Laurel Minjares: \$60,850.00 plus Mercury Sable</p> <p>Dan Driscoll: \$58,750.00 plus Sierra Travel Trailer</p> <p>John Driscoll: \$64,750.00</p> <p>Mavis Lynn Driscoll: \$64,750.00</p>	
		<b>Reviewed by:</b> skc	
		<b>Reviewed on:</b> 4-17-14	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 1 – Driscoll</b>	

12200, et seq.]

<b>DOD: 7/29/2010</b>	<b>FRANK SCOTT HINE</b> was appointed Administrator with Full IAEA and bond set at \$118,260.00 on 1/5/2011.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need <b>First Account, Petition for Final Distribution</b> or <b>current written status report</b> 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>
	Minute order dated 6/15/2012 states the court orders bond set at \$45,000.00 and Limited IAEA authority.	
	Bond of \$45,000.00 filed on 8/10/12.	
<b>Cont. from 062113, 080213, 091313, 111513, 31714, 040214</b>	Letters issued 10/24/12.	
<b>Aff.Sub.Wit.</b>	Inventory and Appraisal filed on 6/6/2012 showing the estate valued at \$134,550.00	
<b>Verified</b>	<b>Creditor's Claims filed:</b>	
<b>Inventory</b>	CitiBank - \$12,563.66	
<b>PTC</b>	DCM Services - \$ 260.80	
<b>Not.Cred.</b>	Frank Hine - \$ 4,743.41	
<b>Notice of Hrg</b>	Donna Langley - \$17,625.99	
<b>Aff.Mail</b>	Wesley Langley - \$ 1,397.38	
<b>Aff.Pub.</b>	FTB - \$ 2,660.09	
<b>Sp.Ntc.</b>	FTB - \$ 4,337.54	
<b>Pers.Serv.</b>	<b>Total \$43,689.17</b>	
<b>Conf. Screen</b>	<b>Former Status Report filed 9/9/13 states</b> Mr. Krbechek met with Mr. Hine since the last status conference. Mr. Hine will be present in court on 9/13/13 to provide updated information regarding the status of the estate. The beneficiary of the estate is the decedent's minor daughter, Noelle Hine. Ms. Hine will turn 18 before the end of this year. Mr. Hine has been making all the monthly payments on the house and the loan is current. Ms. Hine's future is uncertain and she is not ready to own a house. Thus, it is in the best interest of the estate that the house be sold. The personal representative will provide an update regarding the status of the property listing at the next hearing.	
<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: KT</b>
		<b>Reviewed on: 4/21/14</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 2A - Hine</b>

**Former Status Report of Randolph Krbechek filed on 11/14/13 states** he has met with Mr. Hine several times since the last hearing. Mr. Hine reports that he has completed most of the tasks to close the estate. The home is listed for sale and is in good, saleable condition. It is anticipated that they will be receiving offers in the foreseeable future. Sale of the real property must be confirmed by the court.

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

<b>DOD: 7/29/2010</b>	<b>FRANK HINE</b> is Administrator/petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> <li><b>Friday, May 16, 2014</b> at 9:00 a.m. in Department 303, for the filing of receipt for blocked account.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
<b>Cont. from</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 checked="" 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 checked="" 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>Sale price</b> - <b>\$123,500.00</b></p> <p><b>Overbid</b> - <b>130,175.00</b></p> <p><b>Reappraisal</b> - <b>\$123,500.00</b></p> <p><b>Property</b> - 3255 E. Princeton, Fresno CA</p> <p><b>Publication</b> - Business Journal</p> <p><b>Buyers</b> - Rogelio Morales Rojo &amp; Maria Fernanda Flores, husband and wife as Joint Tenants.</p> <p><b>Broker</b> - <b>\$7,410.00</b> (6% - payable to Ruff V. Alday of Guarantee Realty)</p> <p>Current bond is \$45,000.00. Proceeds from the sale will be placed into a blocked account.</p>	
		<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 4/21/14</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 2B - Hine</b></p>

**(1) First Account and Report of Administrator and Petition for Its Settlement and (2) for Allowance of Compensation for Extraordinary Fees to Attorneys**

<b>DOD: 8/25/12</b>		<b>DELIA GONZALEZ</b> , Administrator, is petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> A Ex Parte Petition to Withdraw Funds from Blocked Account at Bank of America and place those same funds into a Blocked Account at Chase Bank is in the file for the Court's consideration.</p> <p>If the Court signs the blocking order then <b>a status hearing will be set on May 28, 2014</b> for the filing of the Receipt for Blocked Account. <b>Note:</b> Petitioner has a Petition for Preliminary Distribution set for the same date.</p> <p><b>Reviewed by:</b> KT</p> <p><b>Reviewed on:</b> 4/21/14</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 3 – De La Mora</b></p>
		Account period: 8/25/12 – 11/21/13	
		Accounting - <b>\$2,537,347.21</b>	
		Beginning POH - <b>\$2,401,634.47</b>	
		Ending POH - <b>\$1,847,330.25</b>	
<b>Cont. from 032614</b>		<b>Bond is set at \$200,000.00</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	<b>Petitioner states</b> the estate is not yet in a condition to close. JDM Transport Inc., JDM Brokerage Inc., and L & M Inc., (all assets of the estate) have unresolved issues with the IRS.	
<input checked="" type="checkbox"/>	<b>Verified</b>	There is outstanding litigation. Francisco De La Mora vs. Irybird Landscape, Fresno Superior Court Case no. 12CECG02162 is set for mandatory settlement conference on 4/16/14 and for trial on 5/12/14 in Dept. 51.	
<input checked="" type="checkbox"/>	<b>Inventory</b>	Petition states attorney Daniel Bruce and the firm of Wild, Carter and Tipton performed extraordinary legal services in the administration of the estate. Petitioner paid Daniel Bruce for services rendered prior to the decedent's death in the amount of \$1,298.63. Wild, Carter and Tipton were retained to make corrections through the DMV on a scrivener's error on the title of one of the vehicles that were sold. Wild, Carter and Tipton was paid \$234.37.	
<input checked="" type="checkbox"/>	<b>PTC</b>	<b>Petitioner prays that:</b>	
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>	1. The first account and report be settled, allowed and approved;	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	2. All acts and proceedings of Petitioner as Administrator be confirmed and approved;	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	3. Approval of prior payments of attorney fees to Daniel Bruce and Wild, Carter and Tipton.	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>	10/15/12	
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		

**(1) First Account and Report of Administrator and Petition for Its Settlement and (2) for Allowance of Compensation for Extraordinary Fees to Attorneys**

<b>DOD: 8/25/12</b>		<b>DELIA GONZALEZ</b> , Administrator, is petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> A Ex Parte Petition to Withdraw Funds from Blocked Account at Bank of America and place those same funds into a Blocked Account at Chase Bank is in the file for the Court's consideration.</p> <p>If the Court signs the blocking order then <b>a status hearing will be set on May 28, 2014</b> for the filing of the Receipt for Blocked Account. <b>Note:</b> Petitioner has a Petition for Preliminary Distribution set for the same date.</p> <p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 4/21/14</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 4 – De La Mora</b></p>
		Account period: 8/25/12 – 11/22/13	
<b>Cont. from 032614</b>		Accounting - <b>\$2,335,092.19</b>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		Beginning POH - <b>\$2,199,572.83</b>	
<input checked="" type="checkbox"/>	<b>Verified</b>	Ending POH - <b>\$1,606,944.56</b>	
<input checked="" type="checkbox"/> <b>Inventory</b>		<b>Bond is set at \$200,000.00</b>	
<input checked="" type="checkbox"/>	<b>PTC</b>	<b>Petitioner states</b> the estate is not yet in a condition to close. JDM Transport Inc., JDM Brokerage Inc., and L & M Inc., (all assets of the estate) have unresolved issues with the IRS.	
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>	There is outstanding litigation. Francisco De La Mora vs. Irybird Landscape, Fresno Superior Court Case no. 12CECG02162 is set for mandatory settlement conference on 4/16/14 and for trial on 5/12/14 in Dept. 51.	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	W/	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	Petition states attorney Daniel Bruce and the firm of Wild, Carter and Tipton performed extraordinary legal services in the administration of the estate. Petitioner paid Daniel Bruce for services rendered prior to the decedent's death in the amount of \$1,298.63. Wild, Carter and Tipton were retained to make corrections through the DMV on a scrivener's error on the title of one of the vehicles that were sold. Wild, Carter and Tipton was paid \$234.37.	
<b>Aff.Pub.</b>		This court authorized payment of \$5,000.00 to Helon and Manfredo to pay initial expenses of settling a wrongful death lawsuit brought by Jesse Salguero. Petitioner requests authority to pay Helon and Manfredo a total of \$18,222.75 for extraordinary services in connection with the settlement of the wrongful death action.	
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<input checked="" type="checkbox"/>	<b>Letters</b>	10/15/12	
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		

**5 Carol Jane Bradley (Estate)**

**Case No. 13CEPR00218**

**Atty Scholnick, Robert M. (of Van Nuys, for Paul Bradley – Administrator – Petitioner)**

**(1) Waiver of First and Final Account, Report of Administrator, (2) Petition for Statutory Administrator and Attorney's Fees, and Reimbursement of Costs, (3) Petition for Final Distribution**

<b>DOD: 12-28-12</b>	<b>PAUL BRADLEY</b> , Administrator with Full IAEA with bond of \$167,000.00, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. <b>Need Order.</b></p> <p>See Local Rule 7.6.1.A – monetary distributions should be stated in dollars and not as a percentage of the estate.</p> <p>Based on the figures provided, Examiner calculates \$23,839.26 to each heir.</p>
	Accounting is waived.	
	I&A: \$113,829.91 POH: \$54,674.25 (cash)	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>		
<input checked="" type="checkbox"/> <b>Inventory</b>	Administrator (Statutory): Waived	
<input checked="" type="checkbox"/> <b>PTC</b>	Attorney (Statutory): \$4,219.73	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Costs: \$1,276.00 (filing, certified letters, probate referee, publication)	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	q Closing: \$1,500.00	
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>	Distribution pursuant to intestate succession:	
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>	Paul Bradley: 50%	
<input checked="" type="checkbox"/> <b>Letters</b>	Peggy Ralston: 50%	
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<input checked="" type="checkbox"/> <b>9202</b>		
<b>Order</b>	X	
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 4-18-14
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 5 – Bradley</b>

**6 Sukhvir Bassi (Estate)**

**Case No. 13CEPR00744**

**Atty Kipnis, Howard A. (for Harpreet Bassi – Administrator/Petitioner)**

**(1) First and Final Account and Report of Status of Administration of Estate and Petition for Settlement Thereof; (2) Petition to Close the Estate, (3) for Final Distribution, (4) and Waiver of Administrator and Attorney's Statutory Compensation**

<b>DOD: 08/15/12</b>	<b>HARPREET BASSI</b> , Administrator, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>The Petition does not address the required notice to the Franchise Tax Board pursuant to Probate Code § 9202(c).</li> <li>Need Order. <b>Note:</b> The Order must conform to Local Rule 7.6.1A (monetary distributions must be stated in dollars).</li> </ol>
	Accounting period: <b>08/15/12 – 02/18/14</b>	
	Accounting - <b>\$567,552.98</b>	
	Beginning POH - <b>\$53,065.58</b>	
	Ending POH - <b>\$553,101.21</b>	
<b>Cont. from</b>	Administrator - <b>waived</b>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Attorney - <b>waived</b>	
<input checked="" type="checkbox"/> <b>Verified</b>		
<input checked="" type="checkbox"/> <b>Inventory</b>		
<input checked="" type="checkbox"/> <b>PTC</b>		
<input checked="" type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b> w/	<b>Distribution, pursuant to intestate succession, is to:</b>	
<input type="checkbox"/> <b>Aff.Pub.</b>	Makhan Singh Bassi and Sukhwinder Kaur Bassi - 100% of the estate in equal shares	
<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> 10/14/13		
<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 type="checkbox"/> <b>Order</b> x		
<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> x		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 04/18/14
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 6 – Bassi</b>

**(1) First and Final Report of Administration and Petition for Its Settlement; Waiver of Accounting; (2) Petition for Allowance of Attorneys' Fees; and (3) Petition for Final Distribution**

<b>DOD: 08/15/13</b>	<b>GORDON TRUXELL</b> , Executor, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>The Petition does not state the value of the property on hand (other than the cash).</li> <li>The Will appears to distribute the residue of the estate to a testamentary trust and not directly to the sons as proposed in the petition. Need clarification.</li> </ol>
	Accounting is waived.	
	I & A - <b>\$3,142,430.31</b>	
<b>Cont. from</b>	POH - Total value not stated (\$65,218.35 cash)	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Executor - <b>waived</b>	
<input checked="" type="checkbox"/> <b>Verified</b>	Attorney - <b>\$44,424.30</b> (statutory)	
<input checked="" type="checkbox"/> <b>Inventory</b>	Closing- <b>\$5,000.00</b>	
<input checked="" type="checkbox"/> <b>PTC</b>	<b>Distribution, pursuant to decedent's will, is to:</b>	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	William Gordon Truxell - \$7,897.02 cash, plus ½ interest in real property, ½ interest in household furnishings, and various securities	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Robert Charles Truxell - \$7,897.02 cash, plus ½ interest in real property, ½ interest in household furnishings, and various securities	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> w/		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b> 10/22/13		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<input checked="" type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 04/18/14
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 7 – Truxell</b>

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

DOD: 09/28/2011	ESTELLA G. GARZA and RAQUEL G. NANEZ, request that ESTELA G. GARZA, RAQUEL G. NANEZ, and ROJELIA G. GONZALEZ, daughters, be appointed co-executors without bond.		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p style="text-align: center;"><b><u>OFF CALENDAR</u></b>  <b>Amended Petition filed 4/17/14 and set for hearing on 05/27/14</b></p> <p><b>The following issues remain:</b></p> <ol style="list-style-type: none"> <li>Original Will is attached to the petition. Pursuant to Probate Code §8200(a)(1) the original will is to be deposited with the Court and a copy of the will attached to the petition.</li> <li>Will is not self-proving. Need proof of Subscribing Witness.</li> <li>Need name and date of death of the decedent's spouse pursuant to Local Rule 7.1.1D.</li> <li>Affidavit of Publication does not include IAEA language therefore the Court cannot grant IAEA authority.</li> <li>Need proof of service of Notice of Petition to Administer Estate on Teodora Garza Garza.  <b>Note:</b> Teodora Garza Garza was served in care of Estella Garza Garza, Trustee. Service in care of another person is insufficient pursuant to CA Rules of Court 7.51(a)(1).</li> <li>Duties &amp; Liabilities of Personal Representative was not signed by Rojelia G. Gonzalez.</li> <li>Need Confidential Supplement to Duties &amp; Liabilities of Personal Representative from Rojelia G. Gonzalez.</li> </ol> <p style="text-align: center;"><b>See additional page</b></p>
Cont. from 121013, 021114, 031114	Full IAEA - ?		
Aff.Sub.Wit.	x	Will dated: 09/27/2001	
✓ Verified		Residence: Parlier	
Inventory		Publication: The Business Journal	
PTC		<b>Estimated value of the Estate:</b>	
Not.Cred.		Personal property - \$20,880.00	
✓ Notice of Hrg		Real property - \$272,907.00	
✓ Aff.Mail	w/	<b>Total - \$293,787.00</b>	
✓ Aff.Pub.		Probate Referee: Steven Diebert	
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 / JF			
Reviewed on: 04/18/14			
Updates:			
Recommendation:			
File 8 – Garza			

8. Need Declaration from Rojelia G. Gonzalez consenting to act as personal representative.
9. #5a(3) or 5a(4) was not answered regarding domestic partner.
10. #5a(7) or 5a(8) of the Petition was not answered regarding issue of predeceased child.
11. Letters do not include each of the personal representatives' names and signatures.
12. Order does not include Rojelia G. Gonzalez.

Examiner retained the order.

**Note: If the petition is granted status hearings will be set as follows:**

- **Friday, 08/15/2014 at 9:00a.m. in Dept. 303** for the filing of the inventory and appraisal **and**
- **Friday, 05/15/2015 at 9:00a.m. in Dept. 303** for the filing of the first account and final distribution.

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.

Petition by Co-Trustees of Intervivos Trust to Establish Claim of Ownership Over Property

		<b>JUDITH KAY FREITAS</b> and <b>OPTIMISM ONE</b> , Successor Trustees, are petitioners.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need Order. <u>Note:</u> The attorney provided an order for consideration at the prior hearing. It was signed on 3/24/14 in error and subsequently stricken. Therefore another order will need to be provided.</p>
		<b>Petitioners state ANDREW J. LAWSON</b> and <b>MARIANETTE LAWSON</b> , husband and wife, established the <b>ANDREW J. AND MARIANETTE LAWSON TRUST OF 1993</b> on September 22, 1993.	
Cont. from 032414, 041414		On 6/21/2005 Marianne Lawson died. On 11/24/13 Andrew J. Lawson died.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	X	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		The property located at 1565 E. Sample, in Fresno, which is the subject of this petition was vested in the name of Andrew J. Lawson and Marianne Lawson and joint tenants, at the death of Andrew J. Lawson. The person having possession of the real property at the death of Andrew was <b>PATRICIA SCHMEDEL</b> , who is not a relative of Andrew, but merely an acquaintance who moved into the real property when Andrew as extremely ill and incapacitated.	
		Decedent's pour over will devises the residue of the estate, which includes the real property herein, to the Trust.	
		Attached to the Trust is a General Assignment executed on 9/22/93, wherein the Trustors assigned and transferred all their right, title and interest in the real property to the Trust.	
		Petitioners, in their capacity as Successor Co-Trustees, assert that the real property is property of the Trust.	
		<b>Petitioners pray for an order:</b>	
		1. That the court determine that the real property located at 1565 E. Sample in Fresno is property of the <b>ANDREW J. AND MARIANETTE LAWSON TRUST OF 1993</b> .	
<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 4/18/14</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 9 – Lawson</b></p>			

**Petition for Modification of Trust Terms**

		<b>CLAUDINE M. WALKER</b> , Trustor, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need written acceptance of trust by Bruce Bickel pursuant to Probate Code § 15600.</p>
		<b>Petitioner states</b> she created the irrevocable trust for the benefit of her two grandchildren (now adults): Ronald Allen Mehling II and Tracy Lynn Mehling. She and the beneficiaries all reside in Fresno County and consent to the proposed modification. The trustee, TCA TrustCorp America, administers from Washington DC; however, the trustee has resigned and consents to venue here for determining the matters presented in this petition.	
	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>Petitioner seeks modification of the provisions appointing successor trustees to provide flexibility in trust administration after her death. <b>BRUCE BICKEL</b> is currently named in the trustor's other estate planning documents, and Petitioner wishes to make the administration among her various trusts consistent. Therefore, Petitioner wishes to modify Article XV B of the trust to appoint Mr. Bickel upon resignation of the trustee, and if Mr. Bickel resigns or ceases to serve, the adult beneficiaries may appoint a successor bank or trust company by majority action or petition for court appointment.</p> <p>Petitioner also wishes to correct the identification of the beneficiary identified incorrectly in the trust as Ronald Allen Mehling. The beneficiary's correct name is Ronald Allen Mehling, II.</p> <p>Because the trust is irrevocable pursuant to Article XI, Petitioner is prevented from making these changes except on petition to this Court.</p> <p>All named beneficiaries consent and the proposed modification will not interfere with the material purpose of the trustor in creating the trust (Probate Code § 15403).</p> <p><b>Petitioner requests the Court approve the modifications as set forth in the petition regarding the appointment of successor trustees and the correction of the name of the beneficiary, and for such other relief as the Court may deem proper.</b></p>	
		<b>Reviewed by:</b> skc	
		<b>Reviewed on:</b> 4-18-14	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 10 – Walker</b>	

Atty de Goede, Dale A., of McCallum & de Goede (for Petitioners Kenneth Crabtree and Paula Fansler)

Petition for Order Confirming Successor Trustees and Trust Assets

Beth DOD: 1/21/2012	<p><b>KENNETH G. CRABTREE</b>, spouse and Co-Settlor, and <b>PAULA FANSLER</b>, sister, Co-Trustees of the <b>CRABTREE 2006 REVOCABLE TRUST</b> dated <b>9/17/2006</b>, as Amended and Restated on <b>7/11/2011</b>, are Petitioners.</p> <p><b>Petitioners state:</b></p> <ul style="list-style-type: none"> <li>The Settlor of the <b>CRABTREE 2006 REVOCABLE TRUST</b> were Petitioner <b>KENNETH G. CRABTREE</b>, and his wife, <b>BETH M. CRABTREE</b> ("Decedent"), and before her death, Decedent and Kenneth were in the process of transferring title of all of their community property assets and their respective separate property assets into the 2006 Trust (<i>copy of 2006 Trust as amended and restated attached as Exhibit 1; copy of 2006 Trust as it existed before 2011 amendment and restatement attached as Exhibit 2</i>);</li> <li>Under Section 2.1 of the 2006 Trust, the Settlor declared that the property described in the <i>Schedules of Trust Assets</i>, which is attached to the 2006 Trust, is transferred in trust under the terms of the 2006 Trust;</li> <li>Based on the authority in [<i>Estate of Heggstad, citations omitted</i>], the Settlor's written declaration of trust is sufficient to create a trust in the property described in the <i>Schedules of Trust Assets</i> and the law does not require separate deeds of conveyances transferring the property to the Trust;</li> <li>The Amended and Restated 2006 Trust contained a <i>Schedule of Community Property Assets</i> and a <i>Schedule of Separate Property Assets of Beth M. Crabtree</i>;</li> <li>Decedent died before she was able to have legal title to all of the assets referenced in the attached <i>Schedules</i> transferred to the Trust;</li> <li>Petitioners request this Court confirm that all of the assets described in the attached <i>Schedules of Trust Assets</i> are assets subject to the <b>CRABTREE 2006 REVOCABLE TRUST</b> dated <b>9/17/2006</b>, as Amended and Restated on <b>7/11/2011</b>, and are under the control of the Petitioners as Co-Trustees;</li> </ul> <p align="center">~Please see additional page~</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>		
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><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 4/18/14</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b> File 11 – Crabtree</p>

**Petitioners state, continued:**

- Petitioner Paula Fansler was appointed as a Co-Trustee under the *Designation of Co-Trustee by Surviving Settlor* of the 2006 Trust as Amended and Restated (copy attached as Exhibit 3);
- The 2006 Amended and Restated Trust included two WestAmerica accounts [numbers omitted] listed on the *Schedule of Community Property Assets* with a [total balance of **\$15,603.96**] as of Decedent's date of death;
- These accounts were listed on the Exhibit A of the original 2006 Trust, before it was amended and restated; although Decedent listed these WestAmerica accounts in the 2006 Trust, a review of the actual account statements following the Decedent's death revealed that these accounts were still titled in the Decedent's name as Trustee of a **TRUST AGREEMENT dated 3/15/1993** ("1993 Trust"), in which Decedent was the sole Trustor and Initial Trustee (copy of 1993 Trust Agreement attached as Exhibit 4);
- Although no specific revocation of the 1993 Trust has been located by Petitioners, the fact the Decedent included the WestAmerica bank accounts on the Schedules of the later 2006 Trust serve as a declaration of disaffirmance by the Decedent of the 1993 Trust [*Brucks v. Home Federal Sav. And Loan, citations omitted*];
- This declaration of disaffirmance is further buttressed by the fact that no other assets have been located by the Petitioners which are titled in the name of the 1993 Trust;
- All of the assets listed on the *Exhibit A of the 1993 Trust* have either been transferred to the 2006 Trust or are no longer in existence;
- If there were any other assets held by the Decedent outside of the Trust, the **Last Will of Beth M. Crabtree dated 7/11/2011** distributes those assets to the 2006 Trust (copy of Will of Beth M. Crabtree attached as Exhibit 5);
- Petitioners assert that the WestAmerica bank accounts should be subject to their control under the 2006 Trust and should not be part of the 1993 Trust.

**Petitioners pray for an Order that the assets described in the *Schedule of Community Property Assets* and the *Schedule of Separate Property Assets* of Beth M. Crabtree attached to the 2006 Trust, as Amended and Restated, are subject to the management and control of Petitioners KENNETH G. CRABTREE and PAULA FANSLER, as Co-Trustees of the 2006 Trust, as Amended and Restated.**

**Note:** Because *Exhibit A of the 1993 Trust* created by the Decedent does not include the WestAmerica bank accounts as assets of the 1993 Trust, it appears Petitioners' statement regarding the potential of any other assets held by the Decedent "outside of" the 1993 Trust is key in this circumstance, since the WestAmerica accounts appear only on the later 2006 Trust schedules (both the initial 2006 Trust and Amended and Restated 2006 Trust), and the two bank accounts listed on *Exhibit A of the 1993 Trust* are Wells Fargo bank accounts, thereby necessitating an inference that the WestAmerica bank accounts, though titled in Decedent's name as Trustee of the 1993 Trust, may have actually been assets held by the Decedent outside of the 1993 Trust, which assets would fall within the distribution scheme of Decedent's Will giving her entire estate to the 2006 Trust, as Amended and Restated.

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

DOD: 11-24-11	<b>SPECIAL ADMINISTRATION EXPIRES 4-22-14 (LETTERS NOT ISSUED)</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>LEO KERMOYAN</b> , Son, is Petitioner and requests appointment as Administrator with Will Annexed (bond not addressed).	<b>Note:</b> The Order for Special Administration authorized the Special Administrator to take possession of the 12 apartment units located on Clinton Ave., in Fresno, collect all claims, rents, and other income, pay debts associated with the property, open an estate checking account, and conduct management and maintenance of the units. The order fixed bond at \$23,000.00; however, bond has not been filed and Letters have not issued.
✓ Aff.Sub.Wit.	Full IAEA: ok	
✓ Verified	Will dated: 8-11-04	
Inventory	Residence: Fresno	
PTC	Publication: Fresno Business Journal	
Not.Cred.	Estimated Value of Estate: Real property: \$280,000.00 Annual income from real property: \$22,800	<b>1. Need bond of \$302,800.00.</b>
✓ Notice of Hrg	Probate Referee: Rick Smith	<b>Note:</b> If granted, the Court will set status hearings as follows:
✓ Aff.Mail		<ul style="list-style-type: none"> <li>• Friday 6-13-14 for filing of bond</li> <li>• Friday 8-29-14 for filing of I&amp;A</li> <li>• Friday 8-21-15 for filing first account or petition for final distribution</li> </ul>
✓ Aff.Pub.		If the proper items are on file prior to the status dates, the hearings may come off calendar.
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
✓ Letters		<b>Reviewed by:</b> skc
✓ Duties/Supp		<b>Reviewed on:</b> 4-18-14
Objections		<b>Updates:</b>
Video Receipt		<b>Recommendation:</b>
CI Report		<b>File 12B – Kermoyan</b>
9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Ex Parte Petition to Remove Gary Hamilton as Trustee and Appoint Interim Trustee  
 Pending Final Hearing

DOD: 03/13/11		<p><b>JAMIE STAR HAMILTON THOMAS</b>, beneficiary, is Petitioner.</p> <p><b>Petitioner states:</b></p> <ol style="list-style-type: none"> <li>1. She is a beneficiary of the JAMES O. HAMILTON LIVING TRUST dated 04/16/03, as amended on 12/20/07 (the "Trust").</li> <li>2. The initial trustee of the Trust was James O. Hamilton. The nominated successor trustee was Gary Hamilton ("Gary"). Gary has been the acting successor trustee since James O. Hamilton's death on 03/13/11.</li> <li>3. The Trust provides that after the death of James O. Hamilton, the successor trustee should divide the trust assets into four shares for each of four beneficiaries: the Petitioner (Jamie Starr Hamilton Thomas), Joel Wade Hamilton ("Wade"), Cynthia Ann Thomas, and Richard Allen Thomas. The trustee shall make monthly payments of \$1,000.00 each to the four beneficiaries once that beneficiary reaches 60 years of age. If the assets of the Trust are not liquid, then the trustee must use his best efforts to liquidate the assets of the Trust to make these payments.</li> <li>4. At the time James O. Hamilton passed away, the Petitioner was over 60 years of age. Accordingly, she was entitled to monthly payments of \$1,000.00 starting March 13, 2011. Despite the clear provisions of the Trust, Gary has not made a single payment to Petitioner from the assets of the Trust.</li> <li>5. On 06/03/13, Petitioner filed a Verified Petition for (1) Removal of Trustee; (2) Accounting; (3) Surcharge; and (4) Approval of Attorney Fees (the "Petition"). The Petition asked the Court to remove Gary as trustee of the Trust and to appoint an independent third-party as trustee.</li> </ol> <p>Continued on Page 2</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 at least 5 days prior to the hearing (per Order on Ex Parte Petition) filed 04/14/14.</li> </ol> <p><b>Note:</b> The hearing on Petitioners Verified Petition for Removal of Trustee, Accounting, Surcharge, and Approval of Attorney Fees was continued for a settlement conference on 05/12/14 and set for an evidentiary hearing on 06/16/14.</p>	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			x
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			x
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
		<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 04/21/14</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 13 – Hamilton</b></p>		

6. Gary filed a response to the Petition (the "Objection") stating that he had provided a trust accounting in October 2012 (the "Purported 2012 Accounting"). The Purported 2012 Accounting is not an accounting, but rather a list of assets of the Trust. The list includes two "missing items", namely gold coins worth \$245,000.00 and \$28,000.00 in cash.
7. Gary further admitted that he had purchased 20 acres in Fresno County (the "Fresno Property") from James O. Hamilton and given the Trust a promissory note for \$297,000.00 related to the purchase. Gary also gave the Trust a second promissory note for \$100,000.00. However, Gary admits that he never made a single payment on either note and now claims that he transferred the Fresno Property back to the Trust in lieu of making payments on the \$297,000.00 note.
8. Gary subsequently prepared an accounting dated 12/12/13 (the "Purported 2013 Accounting").
9. The Purported 2013 Accounting shows that the Trust holds a promissory note given by Wade to the Trust in the amount of \$25,000.00. Notwithstanding the fact that Wade owes money to the Trust, the Trust paid Wade \$1,000.00 a month from December 2011 through June 2013. Gary has marked these payments as repayments on loans Wade allegedly gave to the Trust. Moreover, the Purported 2013 Accounting does not show that Wade ever made any payments on the \$25,000.00 note he owed to the Trust.
10. In other words, Wade owed \$25,000.00 to the Trust; Wade paid approximately \$17,000.00 to the Trust; and yet the Trust then paid out approximately \$17,000.00 to Wade in payments of \$1,000.00 a month – the exact amount that should have been paid to the Petitioner.
11. Gary has chosen to characterize the payments to Wade as "loan repayment" from December 2011 – June 2013. However, the final "loan" shown on the Purported 2013 Accounting was allegedly given by Wade to the Trust on 06/21/13 – after the Trust had already "reimbursed" Wade for the alleged loan.
12. Although Gary as trustee holds title to over 600 acres of land in Oklahoma, he has not sold that property and has only collected \$10,000.00 in rent related to that property. Moreover, Gary has allegedly deeded the Fresno Property back to the Trust, but is not paying rent on the property and the Trust has no rental income from it (assuming that the Fresno Property was properly transferred to the Trust).
13. The Purported 2013 Accounting shows an estimated value for the Fresno Property of \$160,000.00. In other words, the Trust previously held a note for \$297,000.00 from Gary, and now only holds a property worth \$160,000.00 after Gary unilaterally transferred the Fresno Property to the Trust – a loss of \$137,000.00 to the Trust. Gary has attempted to get out of a bad land deal for himself personally by transferring the Fresno Property to the Trust, to the detriment of the beneficiaries of the Trust.
14. The Purported 2013 Accounting also shows that Wade owes the Trust under a promissory note in the amount of \$25,000.00, and that Cynthia Barton owes the Trust under a promissory note in the amount of \$30,000.00. Moreover, the Purported 2013 Accounting further shows that neither Wade nor Cynthia have made any payments to the Trust on either of those notes.
15. "A violation by the trustee of any duty that the trustee owes the beneficiary is a breach of trust" (Probate Code § 16400). A trustee has a duty to administer the trust according to the trust instrument. "The trustee has a duty to administer the trust solely in the interest of the beneficiaries". (*Id.* § 16002(a).) **Note:** Further authority provided in *Petition*.
16. Gary has violated numerous duties as trustee. Gary has refused to pay to the Petitioner the \$1,000.00 a month distributive payments she is owed under the terms of the Trust. At the same time, he has made \$1,000.00 a month payments to another beneficiary, Wade. Moreover, Gary has made the payments to Wade under the guise of "loan repayments," when in fact Wade owes money to the Trust and Gary's own accounting shows that Wade is not making payments on his debt.
17. Furthermore, Gary has engaged in self-dealing, insofar as he unilaterally chose to exchange a note worth \$297,000.00 that he owed to the Trust for a property worth \$160,000.00, a loss of \$137,000.00 to the Trust in favor of Gary.
18. Even though he has been trustee since 2011, Gary still has not sold the Oklahoma property in order to make the required payments to the Petitioner. Nonetheless, he has flown Wade to Oklahoma at the expense of the Trust and has paid Wade for unspecified "natural gas research".
19. Moreover, even though Gary identified \$245,000.00 in gold coins and \$28,000.00 as missing cash, Gary does not appear to have taken any steps to recover those assets for the Trust. Yet he continues to list these "assets" as assets of the Trust.

Continued on Page 3

20. Petitioner has filed a formal petition to remove Gary as trustee, to which he has objected. An evidentiary hearing is set for June 2014. In the meantime, however, Gary is not paying the Petitioner the amounts she is owed under the Trust and he is looking the other way while Wade and Cynthia Barton fail to make payments on the debt they owe to the Trust. He is not maximizing the income to the Trust for the benefits of its beneficiaries and has failed to sell the Oklahoma land in order to fulfill his duties.
21. Accordingly, the Petitioner respectfully asks the Court remove Gary on an interim basis pending the final hearing on the removal petition, and to appoint a neutral third-party to administer the Trust while the parties litigate the removal issues and the accounting issues.
22. Petitioner has spoken to Bruce Bickel, who has stated that he is willing and able to serve as an independent trustee pending the evidentiary hearing and the Court's final decision on the Petition.

**Petitioner prays for an Order:**

1. Suspending Gary's powers to act as trustee of the Trust pending a final resolution of the Petition;
2. Appointing Bruce Bickel, or another independent fiduciary as decided by the Court, as special trustee to serve as trustee until final resolution of the Petition;
3. For attorney's fees and costs;
4. For any and all other orders that the Court deems proper and just.

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

Age: 8	<b><u>NO TEMPORARY REQUESTED</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	WINNETKA HAYNES, maternal grandmother, is Petitioner.	1. Need <i>Notice of Hearing</i> .
	Father: <b>ALONZO BRADFORD</b> Mother: <b>JOZETTE BRADFORD</b>	2. 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:
Cont. from	Paternal grandfather: WILLIE BRADFORD Paternal grandmother: THELMA BLACKMOORE	a. Alonzo Bradford (father) – personal service required
Aff.Sub.Wit.	Maternal grandfather: BILLY MCGINNIE – <i>deceased</i>	b. Jozette Bradford (mother) – personal service required
✓ Verified	<b>Petitioner states</b> that the minor's parents don't have a stable home. Both parents are in and out of prison. Petitioner states that she has been caring for Jamani for the past 5 years.	c. Willie Bradford (paternal grandfather) – service by mail sufficient
Inventory		d. Thelma Blackmoore (paternal grandmother) – service by mail sufficient
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
✓ Conf. Screen	<b>Court Investigator JoAnn Morris filed a report on 04/09/14.</b>	
✓ Letters		
✓ Duties/Supp		
Objections		
Video Receipt		
✓ CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
✓ UCCJEA		
Citation		
FTB Notice		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 04/21/14
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 14 – Bradford</b>

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

Age: 10	<b>TEMPORARY EXPIRES 02/04/2014</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>CONTINUED FROM 02/04/14</b> <b>Minute Order from 02/04/14 states: an ICWA packet is provided to the petitioners. Darnell Robinson is directed to provide his contact information to the Clerk's Office forthwith. Parties agree to participate in mediation today at 10:30 a.m. regarding visitation. The temporary is extended to 04/22/14.</b>  <b>As of 04/18/14, nothing further has been filed.</b>  1. The Petitioner indicated to the CI that the minor has American Indian ancestry. Therefore, need <b><u>Notice of Child Custody Proceeding for Indian Child</u></b> (Form ICWA-030) to be completed and returned to the Probate Clerk's Office <b>as soon as possible</b> . The guardianship <b>cannot go forward</b> without this Notice. <b>60 days must elapse after the Notice is served before a guardianship can be granted</b> . A blank copy of the form is in the file for Petitioner. It should be completed and returned as soon as possible to the Probate Clerk's Office. The Probate Clerk's Office will complete service. <b>Note:</b> The Petition was not marked that the minor had Indian Ancestry.  2. Need service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Guardianship or Consent &amp; Waiver of Notice or Declaration of Due Diligence</i> for: a. Darnell Robinson (father) – personal service required b. Paternal grandfather – service by mail sufficient c. Paternal grandmother – service by mail sufficient
	<b>ANDREW BROWN</b> , mother's fiancé, and <b>CONNIE JIMENEZ</b> , maternal aunt are petitioners.		
	Father: <b>DARNELL ROBINSON</b>		
Cont. from 020414	Mother: <b>CYNTHIA VALDEZ - Consent and Waiver of Notice filed 12/13/2013</b>		
<input type="checkbox"/> Aff.Sub.Wit.	Paternal Grandfather: Paternal Grandmother:		
<input checked="" type="checkbox"/> Verified	Maternal Grandfather: <b>ROBERT VALDEZ – served by mail on 12/06/13</b>		
<input type="checkbox"/> Inventory	Maternal Grandmother: <b>JANET MARIE JIMENEZ – served by mail on 12/06/13</b>		
<input type="checkbox"/> PTC	<b>Petitioners state:</b> Da'Veon's mother, Cynthia Valdez, has been diagnosed with Stage 4 cancer and her death is imminent, she may not live to the hearing. The biological father has not been in the child's life for the entirety of it and has not seen the child since the age of three. The biological father is believed to be incarcerated in California. The mother is anxious for the child to have guardians prior to her death, which could come at any moment. Proposed guardian, Andrew Brown, has helped raise the minor and has been his father figure for most his life.		
<input type="checkbox"/> Not.Cred.	<b>Court Investigator Charlotte Bien filed a report on 01/24/14.</b>		
<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.	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			
<b>Reviewed by:</b> JF			
<b>Reviewed on:</b> 04/18/14			
<b>Updates:</b>			
<b>Recommendation:</b>			
<b>File 15 – Robinson</b>			

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

		<b>TEMP GRANTED EX PARTE EXPIRES 4-22-14</b>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li><b>Need Notice of Hearing.</b></li> <li><b>Need proof of service of Notice of Hearing at least five Court days prior to the hearing per Probate Code §2250(e) or consent and waiver of notice or declaration of due diligence on:</b> <ul style="list-style-type: none"> <li>- <b>George Mack (Father)</b></li> <li>- <b>Donna Mack (Mother)</b></li> </ul> </li> </ol> <p><b>Note: The father is in the Fresno County Jail.</b></p> <hr/> <p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 4-21-14</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 16 – Mack</b></p>
		<b>STEFFANI R. HARRIS</b> , Non-relative, is Petitioner.	
		Father: <b>GEORGE MACK</b> Mother: <b>DONNA MACK</b>	
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>	Paternal Grandfather: Unknown Paternal Grandmother: Unknown	
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>	Maternal Grandfather: Donald McCoy Maternal Grandmother: Pamela Menagh	
	<b>Notice of Hrg</b>	X	
	<b>Aff.Mail</b>	Siblings: Dalton McCoy, Georgia Mack, McKenzie Carter (ages not provided)	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>	X	
✓	<b>Conf. Screen</b>	<b>Petitioner states</b> the mother started drinking and using again on March 27. Petitioner tried to get her into a rehabilitation center but she decided she'd rather keep drinking. It's all she thinks about and does, nothing can be said to get through to her to stop drinking even in light of the fact that she's already lost ten (10) children. She lost rights to two of them on March 19 and then had Petitioner come and get Gia to care for her so that she could keep partying.	
✓	<b>Letters</b>		
✓	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
✓	<b>Order</b>	Petitioner requests to be excused from giving notice to the father because he is incarcerated for violating a protective order restraining him from seeing Donna. Petitioner requests to be excused from giving notice to the mother because she called on April 4 threatening violence if Petitioner didn't give Gia back. She is an absolute risk to Gia in her condition. She makes contact every couple of days, banging on the door, and repeatedly ringing the doorbell. Petitioner now calls the police when Donna makes contact. Petitioner is afraid that she will try to take her and that serving this notice will cause further harassment. Law enforcement has been to the house three times in the past two days.	
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
✓	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>	Petitioner requests help to protect this child.	