



## ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

**First and Final Report of Special Administrator of Status of Administration; Waiver of Accounting; and Petition for Allowance of Statutory Attorneys' Compensation; and for Final Distribution.**

<b>DOD: 10/8/04</b>		<p><b>HRANT L. GEORGE</b>, Special Administrator, is petitioner.</p> <p><b>Leon Y. George</b> and <b>Armen L. George</b> were appointed co-Administrators on 1/25/15. <b>Leon Y. George</b> died on 4/10/15. <b>Armen L. George</b> was removed on 11/30/15.</p> <p>I &amp; A - \$301,457.66                  POH - \$179,793.93</p> <p>Administrator - waives</p> <p>Attorney - \$9,024.58</p> <p><b>Distribution, pursuant to intestate succession is to:</b></p> <p>Louise K. George - \$701.56, ½ of the stocks and securities, ½ interest in household, furniture, furnishings and personal effects and ½ interest in real property.</p> <p>Armen L. George, as personal representative of the Estate of Leon K. George - \$701.56, ½ of the stocks and securities, ½ interest in household, furniture, furnishings and personal effects and ½ interest in real property.</p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
<b>Cont. from</b>			<b>Please see related case (the Estate of Leon Y. George) on page 20.</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		1. Need waiver of account from:	
<input checked="" type="checkbox"/>	<b>Verified</b>		a. Louise K. George	
<input checked="" type="checkbox"/>	<b>Inventory</b>		b. Armen L. George as Personal Representative of the Estate of Leon Y. George.	
<input checked="" type="checkbox"/>	<b>PTC</b>		2. Need Allowance or Rejection of Creditor's Claim for the following claims:	
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>		a. MBNA America - \$8,671.45	
<input type="checkbox"/>	<b>Notice of Hrg</b>		X	b. Discover - \$8,041.00
<input type="checkbox"/>	<b>Aff.Mail</b>		X	c. Franchise Tax Board- \$11,714.20
<input type="checkbox"/>	<b>Aff.Pub.</b>			3. Need Notice of Hearing.
<input type="checkbox"/>	<b>Sp.Ntc.</b>		X	4. Need proof of service of the Notice of Hearing on:
<input type="checkbox"/>	<b>Pers.Serv.</b>			a. Louise K. George
<input type="checkbox"/>	<b>Conf. Screen</b>			b. Armen L. George as Personal Representative of the Estate of Leon K. George.
<input checked="" type="checkbox"/>	<b>Letters</b>		1/25/05	5. Need proof of service of the Notice of Hearing along with a copy of the petition, pursuant to Request for Special Notice filed by:
<input type="checkbox"/>	<b>Duties/Supp</b>			a. Franchise Tax Board
<input type="checkbox"/>	<b>Objections</b>		b. Steven Diebert.	
<input type="checkbox"/>	<b>Video Receipt</b>		<b>Please see additional page</b>	
<input type="checkbox"/>	<b>CI Report</b>		<b>Reviewed by:</b> KT	
<input checked="" type="checkbox"/>	<b>9202</b>		<b>Reviewed on:</b> 4/21/16	
<input checked="" type="checkbox"/>	<b>Order</b>		<b>Updates:</b>	
<input type="checkbox"/>	<b>Aff. Posting</b>		<b>Recommendation:</b>	
<input type="checkbox"/>	<b>Status Rpt</b>		<b>File 1- George</b>	
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>	N/A		

6. Schedule A – Sales of Assets does not include the sales price of the assets sold. Probate Code §10800 requires any loss on sales to be included in factoring the statutory fee base therefore the amount the asset was sold for should be included in the Sales of Assets schedule.
7. Petition states between 10/28/04 and 12/31/15 certain securities were sold by E\*Trade Securities and the proceeds were applied to satisfy a margin loan secured by said assets. The assets sold include 22,573 shares of Nortel Network Common Stock valued at \$75,168.09 and 19,072 shares of Valence Technologies valued at \$63,223.68. Court may require more information regarding said margin loan.
8. Proposed distribution appears incorrect. The proposed distribution does not appear have accounted for the attorney fees (distribution includes 100% of the assets on hand). In addition, property on hand shows 227.391 shares of Berkshire Focus Fund; however; distributes 256.40 shares (128.197 to each beneficiary).

Petition to Close Estate and Request for Discharge

DOD: 12/3/2005		<p><b>PUBLIC ADMINISTRATOR</b>, successor Administrator, is petitioner.</p> <p><b>Petitioner states</b> from documents in the file, it appears that the cash assets of the estate are gone. Paid out to the estranged wife on a 13100 Affidavit in 2006. The household furniture and furnishings were taken from the decedent's residence by his girlfriend and put into a storage unit in her name, the subsequently disposed of or sold. They were never turned over to the daughter administering the estate. Ten years have passed since the decedent's death.</p> <p>The Public Administrator's investigator has revealed that there are no assets to administer, and not funds available to use to seek return of possibly misappropriated assets.</p> <p><b>Because there are no assets to administer or recover, the Public Administrator respectfully requests that this estate be closed and she be discharged as successor Administrator.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>	
Cont. from 030816				
<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 checked="" type="checkbox"/>	Sp.Ntc.			W/
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		Reviewed by: KT		
		Reviewed on: 4/20/16		
		Updates:		
		Recommendation:		
		File 2- Silvas		

Probate Status Hearing      Status Re: Third Accounting

Age:			NEEDS/PROBLEMS/COMMENTS:
DOD:			
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
			<b><u>OFF CALENDAR</u></b>
			Third Account filed 4/14/16 is set for hearing on 5/31/16.
			Reviewed by:
			Reviewed on:
			Updates:
			Recommendation:
			File 3- Dix

<b>DOD: 10/27/13</b>	<b>STEPHAN OHANESIAN and ROBERT OHANESIAN</b> , Co-Administrators with Limited IAEA with bond of \$85,000.00, are Petitioners.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note: Petition for Full Authority filed 4/12/16 is set for hearing on 5/24/16.</b>  <b>Note: The heirs have signed "Consent to Ongoing Administration" stating that they do not wish to receive the real property in kind in undivided interests and desire that the administration to continue to clean up and market the property for sale.</b>
<b>Cont from 041515, 051315, 092215</b>	I&A #1: \$4,925,000.00 (real property) I&A #2/Final: \$262,989.81 (\$128,776.50 cash plus various securities)	
<input type="checkbox"/> <b>Aff.Sub.Wit.</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	
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>	1/14/14	
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input checked="" type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>	<p>The Co-Administrators also previously reported that they had received unfavorable reassessments from the Fresno County Tax Administrator on the properties. They appealed, and were able to resolve their differences without having to go before the Board of Supervisors. As a result, the real estate tax savings starting from 10/27/13 to date will be approx. \$35,000 plus approx. \$14,000/year thereafter until the property is sold.</p> <p>Further, the application of the Co-Administrators for the land to be included in an annex to the City of Fresno by Fresno developer Leland Parnigian has now been acted upon. The Fresno County Planning Commission has approved pre-zoning and eventual annexation. The Co-Administrators believe that the rezoning approval, which only has to clear public opinion, will substantially increase the value and marketability of the land.</p> <p>The Co-Administrators are now in a position to sell at least 77 acres and have filed a petition for full authority under IAEA to do so. They are also expecting to receive substantial refunds of overpayment of real estate taxes dating back to 2013 based upon the favorable reassessment adjustments recently obtained through negotiation with the Fresno County Tax Assessor.</p> <p>Co-Administrators therefore request additional time to administer the estate in order to obtain full authority under the IAEA and obtain a sale of the 77 acres. Petitioners request continuance to at least October 2016.</p>	
		<b>Reviewed by: skc</b> <b>Reviewed on: 4/21/16</b> <b>Updates:</b> <b>Recommendation:</b> <b>File 4 – Ohanesian</b>



**Order to Show Cause RE: Failure to Appear**

	<p><b>KIMBERLY ANN BRYANT</b>, Maternal Grandmother, was appointed Guardian of the Estate on 11/10/15 without bond, with \$15,000.00 to be held in a blocked account.</p> <p><b>At the hearing on 11/10/15</b>, the Court signed an Order to Deposit Money into Blocked Account and set status hearing for the filing of the receipt for blocked account for 12/8/15 and additional status hearings for the filing of the Inventory and Appraisal on 4/12/16 and first account on 1/10/17.</p> <p>On 12/8/15, Ms. Bryant appeared and represented that funds had not been received yet as the minor's comp petition had not yet been filed, and the matter was continued to 2/23/16.</p> <p>On 2/23/16, Ms. Bryant appeared and represented that the minor's comp hearing was set for the next day. The matter was continued to 4/5/16.</p> <p><b>On 4/5/16, Ms. Bryant did not appear, and the Court set this OSC as to why she should not be removed for her failure to appear.</b></p> <p>Thereafter, the hearing originally set on 11/10/15 for the filing of the Inventory and Appraisal came up on 4/12/16. When Ms. Bryant also did not appear at that hearing, the Court removed her as guardian of the estate and appointed the Public Guardian. <b>See Page C.</b></p> <p><b>Note:</b> A status report was filed 4/21/16 by Attorney Michele M. Angeles, of Farmer Case &amp; Fedor, attorneys for Lawanna Davis, whose insurance will be making payment to the minor for the death of her mother in a vehicle accident. Attorney Angeles states that due to a miscommunication from her office, Ms. Bryant did not appear on 4/5/16. Ms. Angeles apologizes to the Court and takes full responsibility for Ms. Bryant not appearing on 4/5/16. It is Ms. Angeles' understanding that Ms. Bryant also did not appear at a hearing on 4/12/16. Her office was not aware of such hearing, and Ms. Bryant was not yet in receipt of the funds at that time. Ms. Angeles will appear on 4/26/16 to personally apologize to the Court for Ms. Bryant's non-appearance.</p>	<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <p><b>Note: Although Attorney Angeles takes responsibility for Ms. Bryant's failure to appear, Ms. Bryant is self-represented in this matter and in her capacity as guardian of the estate of minor Cristyonna Wilson, and as such it is her responsibility to calendar status hearings and appear.</b></p> <p><b>Note: Examiner further notes that it appears that Ms. Bryant never came to the Probate Counter after her appointment hearing on 11/10/16 to obtain copies of her Orders or to sign and obtain her Letters; therefore, Letters of Guardianship of the Estate never issued to Ms. Bryant.</b></p>
		<p><b>Reviewed by:</b> skc</p>
		<p><b>Reviewed on:</b> 4/21/16</p>
		<p><b>Updates:</b></p>
		<p><b>Recommendation:</b></p>
		<p><b>File 5B- Wilson</b></p>
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

**Status RE: Report of the Public Guardian as to Interception of the Funds**

	<b>FRESNO COUNTY PUBLIC GUARDIAN</b> was appointed Successor Guardian of the Estate of Cristyonna Wilson on 4/12/16 and ordered to the Public Guardian to take control of all funds immediately.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>1. Need status report of Public Guardian.</b></p>
	Letters issued to the PG on 4/19/16.	
	The Court set this status hearing for a report of the Public Guardian re interception of the funds.	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 4/21/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		File 5C- Wilson

**Probate Status Hearing RE: First Acct and Final Dist**

<b>DOD: 6/15/14</b>	<p><b>ABIGAIL SERRATO</b>, Daughter, was appointed Executor with Full IAEA without bond on 12/9/14. Letters issued on 12/10/14.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
	<p>At the hearing on 12/9/14, the Court set this status hearing for the filing of the first account or petition for final distribution.</p>	<p style="text-align: center;"><b><u>OFF CALENDAR</u></b></p> <p>First and Final Report filed 4/22/16 is set for hearing on 6/7/16.</p>
<b>Cont. from 020916, 030816</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: skc</b>
		<b>Reviewed on: 4/21/16</b>
		<b>Updates: 4/22/16</b>
		<b>Recommendation:</b>
		<b>File 6- Serrato</b>

**First and Final Report of Co-Administrators of Status of Administration;  
Waiver of Accounting; and Petition for Allowance of Statutory Attorneys'  
Compensation; and for Final Distribution**

<b>DOD: 9/5/2013</b>		<b>CHRISTINA NONINI PERICAS and MARTIN NONINI</b> , co-administrators, are petitioners	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Accounting is waived	<ol style="list-style-type: none"> <li>1. Need <i>Notice of Hearing</i>.</li> <li>2. Need proof of service of <i>Notice of Hearing</i> with 15 days notice on Michael Piacentini as Trustee of the Geno A. Nonini Family Trust (Trust A).</li> <li>3. Need waiver of accounting from Michael Piacentini as Trustee of the Geno A. Nonini Family Trust (Trust A).</li> <li>4. Need declaration of trust setting forth the name of trust, its establishment date, taxpayer ID number, verifying that the trust is in full force and effect and that the trustee has an executed copy of the trust in their possession, pursuant to Local Rule 7.12.5.</li> </ol>
<b>Cont. from</b>		I&A - <b>\$628,573.00</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	POH - <b>\$628,573.00</b>	
<input checked="" type="checkbox"/>	<b>Verified</b>	(no cash)	
<input checked="" type="checkbox"/>	<b>Inventory</b>	Co-administrators - waived	
<input checked="" type="checkbox"/>	<b>PTC</b>	Attorney - <b>\$15,571.46</b>	
<input type="checkbox"/>	<b>Not.Cred.</b>	(statutory – to be paid by co-administrators outside of this probate estate)	
<input type="checkbox"/>	<b>Notice of Hrg</b>	x	
<input type="checkbox"/>	<b>Aff.Mail</b>	x	
<input type="checkbox"/>	<b>Aff.Pub.</b>	Costs - none	
<input type="checkbox"/>	<b>Sp.Ntc.</b>	Closing reserve - none	
<input type="checkbox"/>	<b>Pers.Serv.</b>	<b>Distribution, pursuant to decedent's will, is to Michael Piacentini as Trustee of the Geno A. Nonini Family Trust (Trust A) –</b>	
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>	<ul style="list-style-type: none"> <li>• Two units in Tower Park Marina Investors, LP</li> <li>• 91.34% interest in real property located in County of San Luis Obispo</li> </ul>	
<input checked="" type="checkbox"/>	<b>Letters 12/10/14</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> SEF
			<b>Reviewed on:</b> 4/21/2016
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 7- Nonini</b>

Attorney: Jeffrey B. Pape (for Petitioner Harold Rick Moore, son)  
 Attorney: Steven P. Braccini; Brian Wilson, of Palo Alto (for Respondent Kenneth Randolph Moore, son)  
 Attorney: Mark S. Poochigian (also for Respondent Kenneth Randolph Moore, son)  
 Attorney: Gary G. Bagdasarian (for Richard E. Huber, Special Administrator)

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

<b>DOD: 7/14/2014</b>		<b>HAROLD RICK MOORE</b> , son, and second named Executor without bond, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Page 8B</b> is the <i>Status Hearing Re Mediation</i>.  <b>Page 9</b> is the related <i>Moore Family Trust</i>, 15CEPR00111.  <b>Note:</b> <i>Letters of Special Administration</i> issued to <b>RICHARD E. HUBER</b> on 8/20/2015. It appears that through error and inadvertence, Item 2 of the <i>Letters</i> is <u>incomplete</u> as to the person appointed. Court will issue corrected Letters if Petitioner chooses to present new signed Letters to the Clerk.</p> <p><b>Continued from 1/19/2016.</b> <i>Minute Order</i> states Counsel reports that the Santa Clara matter has not yet been transferred. Further, parties have not reached any agreement. The Court will allow a joint verified status report to be filed at least two court days prior to 4/26/2016.</p> <p><i>~Please see additional page~</i></p>
Cont. from 051415, 061615, 081115, 101315, 011916		Full IAEA — OK	
Lost Will Dated: 4/10/2001		Residence — Fresno	
Aff.Sub. <small>S/P</small>		Publication — Business Journal	
✓ Verified		<b>Estimated value of the Estate:</b>	
Inventory		Personal property - <b>\$300,000.00</b>	
PTC		<b>Total</b> <b>\$300,000.00</b>	
Not.Cred		Probate Referee: <b>Rick Smith</b>	
✓ Notice of Hrg		<b>Petitioner states:</b>	
✓ Aff.Mail <small>W/I</small>		<ul style="list-style-type: none"> <li>Decedent's pour over Will conveyed assets to the <b>MOORE FAMILY TRUST dated 4/10/2001</b>, providing that Decedent's assets were to be distributed in 5 equal shares to Decedent's children;</li> <li>After Decedent's stroke in 2011, the Will and the <b>MOORE FAMILY TRUST</b> were in physical possession of Decedent's son, <b>KENNETH RANDOLPH (RANDY) MOORE</b>, who was named executor;</li> <li>Randy then caused to be created and presented to his incapacitated father (Decedent) an irrevocable trust entitled the "<b>KENNETH HAROLD MOORE IRREVOCABLE TRUST dated 4/7/2011</b>" which was intended to alter the disposition of the Decedent's assets by excluding all of Decedent's children and leaving the entirety of the estate to Randy.</li> </ul>	
✓ Aff.Pub.		<i>~Additional summary omitted~</i>	
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
✓ Letters			
✓ Duties/S			
✓ Objectns			
Video Receipt			
CI Report			
9202			
Order <small>X</small>			
Aff. Post			
Status Rp			
UCCJEA			
Citation			
FTB Notice			
		<b>Reviewed by:</b> LEG	
		<b>Reviewed on:</b> 4/21/16	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 8A – Moore</b>	

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

1. Need verified status report to be filed in Case **15CEPR00081**, and proof of service of notice of the status hearing pursuant to Local Rule 7.5(B), which provides that in all matters set for Status Hearing, except if the required document is filed, a verified Status Report must be filed no later than 10 days before the hearing; notice of the status hearing with a copy of the Status Report shall be served on all necessary parties.

**Note for Attorneys' future reference:** It appears "joint verified status report" has been interpreted to mean the status report may be filed in any one of the pending cases, rather than the intended meaning that one joint verified status report agreed upon by all attorneys may be filed by the attorney for one of the parties in each case. Hence, the *Status Hearing Report* filed 4/19/2016 was filed only in Case 15CEPR00111 (Moore Trust), but should also have been filed in the instant Case 15CEPR00081 (Moore Estate.) It should be noted that for the purposes of keeping each separate case complete and accurate (i.e., the Estate case and the Trust case), status reports must be filed in each separate case number, allowing each separate Court record to reflect the most current information. (*Please refer to notes for Case 15CEPR00111, Moore Trust, for summary of Status Hearing Report filed 4/26/2016 in that case number only.*)

**Notes:**

- *Order Granting Petition for Authority to Enter into Partial Contingent Fee Agreement* was filed 3/10/2016 and finds **RICHARD HUBER**, Special Administrator, is authorized to enter into a [Attorney Contingent Fee Contract] and to pay the expense retainer to **MICHAEL M. PULLARA** ("the Handling Attorney") in accordance with the terms of the agreement; and is authorized to replenish its proportionate share of the retainer, if necessary, in accordance with the terms of the agreement, without further order of Court.
- *Partial No. 1 Inventory and Appraisal* filed by **RICHARD HUBER**, Special Administrator, on 4/20/2016 shows the estate assets include a check representing unused retainer from **DANIEL J. CARR**, Attorney at Law, of New Orleans, LA, in the sum of **\$25,059.48**.

Attorney: Jeffrey B. Pape (for Petitioner Harold Rick Moore, son)  
 Attorney: Steven P. Braccini; Brian Wilson, of Palo Alto (for Respondent Kenneth Randolph Moore, son)  
 Attorney: Mark S. Poochigian (also for Respondent Kenneth Randolph Moore, son)  
 Attorney: Gary G. Bagdasarian (for Richard E. Huber, Special Administrator)

Probate Status Hearing Re: Mediation

<b>DOD: 7/14/2014</b>	<b>HAROLD RICK MOORE</b> , son, filed a <i>Petition for Probate of Will and for Letters Testamentary</i> on 1/26/2015.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u><b>Continued from 1/19/2016.</b></u> <i>Minute Order</i> states Counsel reports that the Santa Clara matter has not yet been transferred. Further, parties have not reached any agreement. The Court will allow a joint verified status report to be filed at least two court days prior to 4/26/2016.  <b>Note:</b> <i>Status Hearing Report</i> filed by Petitioner <b>HAROLD RICK MOORE</b> on 4/19/2016 in Case <b>15CEPR00111</b> states, in pertinent part, that on 9/25/2015 the parties attended a mediation; the matters could not be settled at this mediation; the parties will make an effort to present potential trial dates to the Court at the status hearing on 4/26/2016.	
<b>Cont. from 101315, 011916</b>	<b>KENNETH RANDOLPH MOORE</b> , son, filed a <i>Response to Petition for Probate of Will and for Letters Testamentary</i> filed on 5/12/2015.		
<b>Aff.Sub.Wit.</b>	<b>Minute Order dated 8/11/2015</b> from the last hearing on the petition for probate states Counsel reports that mediation is set for 9/25/2015 and a continuance is requested. Matter set on 10/13/2015 for status re: mediation.		
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
			<b>Reviewed by:</b> LEG
			<b>Reviewed on:</b> 4/21/16
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 8B – Moore</b>	

Attorney: Jeffrey B. Pape (for Petitioner Harold Rick Moore, son)  
 Attorney: Steven P. Braccini; Brian Wilson, of Palo Alto (for Respondent Kenneth Randolph Moore)  
 Attorney: Mark S. Poochigian (also for Respondent Kenneth Randolph Moore, son)  
 Attorney: Gary G. Bagdasarian (for Richard E. Huber, Special Administrator)

**Petition to Determine Existence of Trust, for Appointment of Harold Rick Moore as Trustee, for Imposition of Constructive Trust, to Enforce No Contest Clause, for Damages and for Attorneys' Fees and Costs**

<b>DOD: 7/14/2014</b>	<b>HAROLD RICK MOORE</b> , son and remainder beneficiary, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>Petitioner states:</b>	<b>Page 9B</b> is the <i>Status Hearing Re Mediation</i> .
<b>Cont. from 031715, 051415, 061615, 081115, 101315, 011916</b>	<ul style="list-style-type: none"> <li>On 4/10/2001, Decedent created the <b>MOORE FAMILY TRUST dated 4/10/2001 (2001 TRUST)</b>, which formed the basis of Decedent's estate plan (<i>copy attached as Exhibit A</i>);</li> <li>The <b>2001 TRUST</b> devised the Decedent's trust property in equal shares to his 5 adult children: <b>KENNETH RANDOLPH MOORE, ROBIN LARAE WILSON, HAROLD RICK MOORE, SHEILA RENEE SHAW</b> and <b>RONALD DEAN MOORE</b>;</li> <li><b>2001 TRUST</b> provides Kenneth H. Moore is trustee; successor trustees in order of preference are Randy Moore, Rick Moor (Petitioner), and Ron Moore; Decedent was trustee until January 7, 2011, when Decedent suffered a debilitating stroke requiring him to be hospitalized for several weeks; Decedent suffered another stroke requiring hospitalization on 2/24/2011;</li> <li>As a result of these strokes, Decedent no longer had capacity to act as Trustee; while Decedent was in hospital during the first part of 2011, the first successor trustee, Respondent Kenneth Randolph Moore (Randy) asked his sister in law, <b>PAULA MOORE</b>, to provide him with the original estate planning documents, which she procured and delivered to Respondent;</li> <li>On 4/7/2011, Respondent presented Decedent with a new trust, the <b>KENNETH HAROLD MOORE IRREVOCABLE TRUST dated 4/7/2011 (2011 TRUST)</b>, which devised all of the trust property to Respondent.</li> </ul>	<b>Continued from 1/19/2016.</b> Minute Order states Counsel reports that the Santa Clara matter has not yet been transferred. Further, parties have not reached any agreement. The Court will allow a joint verified status report to be filed at least two court days prior to 4/26/2016.
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		1. <i>Status Hearing Report</i> filed 4/19/2016 states the parties have met and conferred and have agreed to execute a stipulation that the four pending proceedings be consolidated for all purposes, and intend to present it to the Court at the status hearing on 4/26/2016. Consolidation of the four matters is inappropriate, as they are all distinct cases (Moore Estate, Moore Family Trust, Kenneth Moore Irrevocable Trust). Consolidation may potentially be appropriate of the two cases for the Kenneth Moore Irrevocable Trust.
<input checked="" type="checkbox"/> <b>Verified</b>		<b>~Please see additional page~</b>
<input type="checkbox"/> <b>Inventory</b>		
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<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input checked="" type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
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<input type="checkbox"/> <b>9202</b>		
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<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>		
		<b>Reviewed by:</b> LEG
		<b>Reviewed on:</b> 4/21/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 9A – Moore</b>

**Status Hearing Report filed by Petitioner HAROLD RICK MOORE on 4/19/2016 states:**

- There are four probate proceedings related to the Decedent currently pending in this Court;
- Two probate proceedings were originally filed in Santa Clara County Superior Court, and have been transferred to this Court; the other two were originally filed in this Court;
- The four proceedings are as follows:
  - **Fresno County Case 15CEPR00081 [Estate of Kenneth Harold Moore]:** Contestant **HAROLD RICK MOORE** filed a Petition for Probate of Will and Letters Testamentary in the County where Decedent died, seeking to probate Decedent's Will dated 4/10/2001; on 6/23/2015, **RICHARD HUBER** was appointed Special Administrator.
  - **Fresno County Case 15CEPR00111 [Moore Family Trust dated 4/10/2001]:** Contestant Harold Rick Moore filed a *Petition to Determine Existence of Trust, for Appointment of Harold Rick Moore as Trustee, for Imposition of Constructive Trust, to Enforce No Contest Clause, for Damages and for Attorneys' Fees and Costs*, seeking to validate Decedent's family trust dated 4/10/2001.
  - **Fresno County Case 16CEPR00362 [Kenneth Harold Moore Irrevocable Trust]:** This case was originally filed as Santa Clara County Case [number omitted] by Trustee, **KENNETH RANDOLPH MOORE**, by way of a Heggstad petition to have certain real and personal property transferred into the 4/7/2011 trust, including Decedent's home in Fresno; Contestants (**HAROLD RICK MOORE** et al) filed their written response on 1/28/2015, asserting that the 2011 trust is invalid on the grounds of lack of capacity, undue influence, mistake, and fraud.
  - **Fresno County Case 16CEPR00363 [Kenneth Harold Moore Irrevocable Trust]:** This case was originally filed as Santa Clara County Case [number omitted] and involves Contestants' (**HAROLD RICK MOORE** et al) Petition for an Order to Invalidate Trust and to Impose Constructive Trust filed herein on 2/10/2015; Trustee, **KENNETH RANDOLPH MOORE**, filed his written response to this petition on 4/12/2015.
- On 7/13/2015, *Petitions to Change Venue* of the Santa Clara actions to Fresno County were heard and taken under submission; on or about 8/11/2015, an order was signed for both Santa Clara County Superior Court cases to be moved to the jurisdiction of Fresno County Superior Court; transfer was completed and cases were filed in Fresno County Superior Court on 4/1/2016;
- On 9/25/2015, the parties attended a mediation; the matters could not be settled at this mediation;
- The parties have met and conferred and have agreed to stipulate that the four pending proceedings be consolidated for all purposes; the parties intend to execute a stipulation for consolidation, and present the same to the Court at the status hearing on 4/26/2016;
- The parties have also met and conferred about scheduling a trial date in the consolidated proceeding; the parties estimate that the trial will consume **7 to 10 court days**;
- The parties will make an effort to present potential trial dates to the Court at the status hearing on 4/26/2016.

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

2. Pursuant to Local Rule 7.4.5, need *Notice of Hearing* captioned "*Reset Notice of Hearing*" to be filed by Petitioner **HAROLD RICK MOORE**, in order to bring before the Court the two transferred Cases **16CEPR00362** and **16CEPR00363**. Similar to matters taken off calendar, these two cases must be brought before this Court via the reset notice, with reference made to the continuance hearing date selected by Court at hearing on 4/26/2016, and the *Reset Notice of Hearing* shall be served in the same manner as that required for an original hearing to all interested parties entitled to notice for all four of the matters.

Attorney: Jeffrey B. Pape (for Petitioner Harold Rick Moore, son)  
 Attorney: Steven P. Braccini; Brian Wilson, of Palo Alto (for Respondent Kenneth Randolph Moore, son)  
 Attorney: Mark S. Poochigian (also for Respondent Kenneth Randolph Moore, son)  
 Attorney: Gary G. Bagdasarian (for Richard E. Huber, Special Administrator)

Probate Status Hearing Re: Mediation

<b>DOD: 7/14/2014</b>		<p><b>HAROLD RICK MOORE</b>, son, filed a <i>Petition to Determine Existence of Trust, for Appointment of Harold Rick Moore as Trustee, for Imposition of Constructive Trust, to Enforce No Contest Clause, for Damages and for Attorney's Fees and Costs</i> on 2/2/2015.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 1/19/2016.</b> Minute Order states Counsel reports that the Santa Clara matter has not yet been transferred. Further, parties have not reached any agreement. The Court will allow a joint verified status report to be filed at least two court days prior to 4/26/2016.</p> <p><b>Note:</b> Status Hearing Report filed by Petitioner <b>HAROLD RICK MOORE</b> on 1/8/2016 states, in pertinent part, that on 9/25/2015 the parties attended a mediation; the matters could not be settled at this mediation; the parties will make an effort to present potential trial dates to the Court at the status hearing on 4/26/2016.</p>
<b>Cont. from 101315, 011916</b>			
<b>Aff.Sub.Wit.</b>		<p><b>KENNETH RANDOLPH MOORE</b>, son, filed an <i>Objection to Petition to Determine Existence of Trust, for Appointment of Harold Rick Moore as Trustee, for Imposition of Constructive Trust, to Enforce No Contest Clause, for Damages and for Attorney's Fees and Costs</i> on 5/11/2015.</p>	
<b>Verified</b>			
<b>Inventory</b>		<p><b>Minute Order dated 8/11/2015</b> from the last hearing on the petition to determine existence of trust states Counsel reports that mediation is set for 9/25/2015 and a continuance is requested. Matter set on 10/13/2015 for status re: mediation.</p>	
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
			<p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 4/21/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 9B – Moore</b></p>

**10 Deyviana Deloach and Benjamin Vasquez (GUARD/P)**

**Case No. 15CEPR00942**

**Guardian Onyegegbu, Ikemefuna (Pro Per)**

**Probate Status Hearing Re: Active Warrant**

		<p><b>IKEMEFUNA N. ONYEGEGBU and LISA LEE MARQUEZ</b>, maternal uncle and aunt, filed a Petition for Appointment of Guardian on 9/23/2015.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>	
<b>Cont. from</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
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<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
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<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 type="checkbox"/>	<b>Order</b>			
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<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>			
			<b>Reviewed by: LEG</b>	
			<b>Reviewed on: 4/21/16</b>	
			<b>Updates:</b>	
			<b>Recommendation:</b>	
			<b>File 10- Deloach &amp; Vasquez</b>	



**12 Angel Harvey (GUARD/P)**

**Case No. 15CEPR01110**

Petitioner Bonboster, Jazmine Yvette Marie (Pro Per – Sister)

Petition for Appointment of Guardian of the Person

		TEMPORARY PETITION DENIED 11/30/2015	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		JAZMINE BONBOSTER, Sister, is Petitioner.	
		~Please see Petition for details~	<b>Continued from 3/1/2016.</b> Minute Order states the Court finds sufficient concern to order that a 1513(b) investigation pertaining to the safety of the minor in the care of Frank Harvey, father, be completed by the Sacramento Department of Social Services to determine if the minor's father is an unfit parent.
		Court Investigator's report filed 01/12/2016.	
		Court Investigator's Supplemental report filed 02/24/2016.	<b>Note for background:</b> Minute Order dated 01/19/2016 states matter is continued to allow time for the reciprocal investigation to be conducted in Sacramento.
		Court Investigator filed on 4/20/2016 the Supplemental Investigator's Report dated 2/24/2016 of Sacramento County Court Investigator.	
		Court Investigator's Report was filed 4/20/2016.	<b>The following issues remain:</b> 1. The mother, Marcelina Villarreal, was served by mail on 12/11/2015. Pursuant to Probate Code §2250 personal service is required. ( <i>Note: Affidavit of Unsuccessful Service verified by Sheriff's Authorized Agent was filed 4/21/2016 for mother; 3 separate Declarations of non-party persons filed 4/21/2016 state personal service to mother was attempted unsuccessfully on several dates.</i> ) 2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: • Paternal Grandparents, if Court does not filed diligence per Declaration filed 4/21/2016.
			<b>Reviewed by:</b> LV / LEG
			<b>Reviewed on:</b> 4/22/2016
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 12- Harvey</b>
Cont. from 011916, 030116			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
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✓ 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			

Petitioner Brenda Tilson (Pro Per)

Petition for Appointment of Guardian of the Person

	<b>TEMPORARY EXPIRES 3/8/2016</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>BRENDA TILSON</b> , maternal grandmother, is Petitioner.		<p><b>Continued from 3/8/2016:</b> Minute Order states the matter is continued for ICWA notice; Ms. Tilson is directed to get the necessary forms completed and returned.</p> <p><b>The following issues remain:</b></p> <ol style="list-style-type: none"> <li>1. Need proof of <u>personal service</u> of the Notice of Hearing with a copy of the Petition for Appointment of Guardian, or Consent to Appointment of Guardian and Waiver of Notice, or a Declaration of Due Diligence, for: <ul style="list-style-type: none"> <li>• <b>Donald Leiffer</b>, father of Jasmine (service by mail filed 1/22/2016 is insufficient);</li> <li>• <b>Jeffrey Jones</b>, father of Brittany, if Court does not find due diligence per declaration filed 1/22/2016;</li> <li>• <b>Jasmine Leiffer</b>, proposed ward (age 16).</li> </ul> </li> </ol> <p align="center">~Please see additional page~</p>
	~Please see Petition for details~		
	Court Investigator's Report was filed on 3/2/2016.		
	Cont. from 030816		
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	ICWA-030	X	
✓	Notice of Hrg		
✓	Aff.Mail	W / O	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			<b>Reviewed by:</b> LEG
			<b>Reviewed on:</b> 4/22/16
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 13- Jones/ Leiffer</b>

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

2. Need proof of service by mail of the *Notice of Hearing* with a copy of the *Petition for Appointment of Guardian*, or *Consent to Appointment of Guardian and Waiver of Notice*, or a *Declaration of Due Diligence*, for:
  - **Billie Tilson**, maternal grandfather;
  - paternal grandparents of Jasmine;
  - paternal grandparents of Brittany;
  - **Kegan Jones**, half-sibling of Brittany, if age 12 or over;
  - **Macy Jones**, half-sibling of Brittany, if age 12 or over.
  
3. Court Investigator's *Report* filed 5/29/2013 indicates the Petitioner reports that she has Cherokee Indian blood, but states that she is not registered; Court Investigator states that an ICWA packet was sent to the Petitioner. Court records do not show the *Notice of Child Custody Proceeding* (Form ICWA-030) has been submitted by Petitioner to the Court for service of notice as required. **Need the *Notice of Child Custody Proceeding* (Form ICWA-030) to be completed by the Petitioner and submitted by her to the Probate Clerk**, in order for the Court to mail this form, together with copies of the petition and attachments, to the child's parents; any Indian custodian; any Indian tribe that may have a connection to the child; the Bureau of Indian Affairs (BIA), and the U.S. Secretary of the Interior, by certified or registered U.S. Mail, return receipt requested. A blank copy of the *Notice of Child Custody Proceeding for Indian Child* (Form ICWA-030) is in the file for Petitioner's use. Petitioner should complete the form and return it to the Probate Clerk as soon as possible.

**Note:** CA Rule of Court 7.1015(c)(9) states if after a reasonable time following service of notice under the act—but in no event less than 60 days—no determinative response to the *Notice of Child Custody Proceeding* (ICWA 030) is received, the Court may determine that the act does not apply to the proceeding unless further evidence of its applicability is later received.

**Probate Status Hearing RE: Proof of Enrollment in Parenting Classes**

	<b>JOEL PIMENTEL, JR.</b> , brother, was appointed guardian of the person on 3/8/2016.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need proof of enrollment in parenting classes.
	Letters issued 3/8/2016.	
	<b>Minute order dated 3/8/2016</b> ordered Joel Pimentel Jr. to attend parenting classes and bring proof of enrollment to the 4/26/2016 status hearing.	
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
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<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:</b> SEF
		<b>Reviewed on:</b> 4/21/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 14- Pimentel</b>

Ex Parte Petition for Appointment of Guardian Ad Litem  
 (Issue of Isabella Rose Anderson and Ava Elizabeth Anderson)

	<b>JAMES S. ANDERSON</b> , Settlor, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <h2 style="text-align: center;"><u>OFF CALENDAR</u></h2> Amended Petition for Appointment of GAL filed 4/19/16 is set for hearing on 5/31/16.  <b>Minute Order 3/8/16:</b> Counsel will submit points and authorities as to the issue of a possible conflict as to Rita Mouren.  <b>Note:</b> Minute Order 3/8/16 re Ex Parte Petition for Limiting the Class of Beneficiaries Whose Consent is Needed to Compel Modification of the Trust states the Court is not requiring the Motion to Compel; Petition granted.  1. A person may not act as a guardian ad litem unless he or she is an attorney or is represented by an attorney. See Note below caption on Petition for Appointment Form DE-350.  Petitioner states the proposed GAL is not represented by Baker Manock & Jensen PC. Need clarification re representation of Ms. Mouren in connection with this matter.  2. Ms. Mouren is the current trustee of the trust. The Court may require clarification or authority re possible conflict.  3. It appears Ms. Mouren already signed a consent to modification of the trust as GAL on behalf of the minor beneficiary on 12/28/15; however, on that date she had not been appointed. If appointed, further consent may be appropriate.
	<b>Petitioner states</b> he is the settlor of the trust and father of the minor child.	
	Petitioner seeks appointment of <b>RITA K. MOUREN</b> to represent the interests of the Issue of minor Isabella Rose Anderson and of the minor Ava Elizabeth Anderson, to consent to modification of a trust under which the above are contingent beneficiaries. See Page A re details.	
	Ms. Mouren is the grandmother of the minors and is a competent and responsible person to protect the interests of the minor. Baker Manock & Jensen, PC has represented Ms. Mouren on other matters. Baker Manock & Jensen, PC is not representing her in this matter.	
Cont. from 030816		
Aff.Sub.Wit.		
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UCCJEA		
Citation		
FTB Notice		
	Reviewed by: skc	
	Reviewed on: 4/21/16	
	Updates:	
	Recommendation:	
	File 15A- Anderson	

Ex Parte Petition for Appointment of Guardian Ad Litem (Isabella Rose Anderson)

		<p><b>JAMES S. ANDERSON</b>, Settlor, is Petitioner.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
		<p><b>Petitioner states</b> he is the settlor of the trust and father of the minor child.</p>	<p><b>Minute Order 3/8/16:</b> Counsel will submit points and authorities as to the issue of Ms. Holt not being an attorney or represented by an attorney.</p>
Cont. from 030816		<p>Petitioner seeks appointment of <b>CHRISTINE ANDERSON HOLT</b> to represent the interests of the minor Isabella Rose Anderson to consent to modification of a trust under which the minor is the beneficiary. See Page A re details.</p>	<p><b>Note:</b> Memorandum of Points and Authorities filed 4/19/16 provides authority and discussion. Please see Memorandum of Points and Authorities for details.</p>
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	<p>Ms. Holt is the aunt of the minor and is a competent and responsible person to protect the interests of the minor. Baker Manock &amp; Jensen, PC has represented Ms. Holt on other matters. Baker Manock &amp; Jensen, PC is not representing her in this matter.</p>	<p><b>Note:</b> Minute Order 3/8/16 re Ex Parte Petition for Limiting the Class of Beneficiaries Whose Consent is Needed to Compel Modification of the Trust states the Court is not requiring the Motion to Compel; Petition granted.</p>
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	<p><b>4. A person may not act as a guardian ad litem unless he or she is an attorney or is represented by an attorney. See Note below caption on Petition for Appointment Form DE-350.</b></p>	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	<p><b>Petitioner states the proposed GAL is not represented by Baker Manock &amp; Jensen PC. Need clarification re representation of Ms. Holt in connection with this matter.</b></p>	
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.	<p><b>5. Ms. Holt is the named successor trustee of the trust. The Court may require clarification or authority re possible conflict.</b></p>	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	<p><b>6. It appears Ms. Holt already signed a consent to modification of the trust as GAL on behalf of the minor beneficiary on 12/28/15; however, on that date she had not been appointed. If appointed, further consent may be appropriate.</b></p>	
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters	<p><b>Reviewed by:</b> skc</p>	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections	<p><b>Reviewed on:</b> 4/21/16</p>	
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report	<p><b>Updates:</b></p>	
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order	<p><b>Recommendation:</b></p>	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt	<p><b>File 15B- Anderson</b></p>	
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Guardian: Sharon Lynette Jones (Pro Per – Maternal grandmother)

Probate Status Hearing RE: Warrant

	<b>SHARON JONES</b> , maternal grandmother, was appointed guardian of the person on 3/15/2016.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need proof that warrant has been cleared.</p>
	<i>Letters issued 3/17/2016.</i>	
<b>Cont. from</b>	Petitioner had an outstanding warrant for an FTA in #M06916638 set for 3/23/2016 to clear the warrant.	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>	<b>Minute order dated 3/15/2016</b> states Sharon Jones is to bring paper-proof of her warrant being cleared to the status hearing on 4/26/2016.	
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> SEF
		<b>Reviewed on:</b> 4/21/2016
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 16- Williams</b>

Probate Status Hearing RE: Proof of Bond

DOD: 8/27/2015	ROBERT ROBLED0, son, was appointed administrator with limited IAEA with bond on \$13,100.00.	NEEDS/PROBLEMS/COMMENTS:
	Minute order dated 3/8/2016 set this status hearing re: proof of bond.	1. <b>Need bond of \$13,100 or 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.
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: SEF
		Reviewed on: 4/21/2016
		Updates:
		Recommendation:
		File 17- Robledo



19 Christopher Harshaw, Jr., and Ciara Harshaw (GUARD/P)

Case No. 16CEPR00191

Petitioner Harshaw, Anna Marie (Pro Per – Paternal Aunt – Petitioner)

Petition for Appointment of Guardian of the Person

		See petition for details.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Minute Order 3/2/16</u> states the Court orders that Ms. Hill must be given notice for the general hearing on 4/26/16. In addition, Ms. Harshaw is to bring documentation of the status of the referenced misdemeanor case to Court on 4/26/16.</p> <p>1. Need Notice of Hearing and proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing on Shameka Hill, mother.</p>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 4/21/16	
			Updates:	
			Recommendation:	
			File 19- Harshaw	

Probate Status Hearing RE: Proof of Bond

<b>DOD: 4/10/15</b>	<p><b>ARMEN L. GEORGE</b> was appointed as Executor with Full IAEA and with bond set at \$152,500 on 3/29/16.</p> <p><b>Minute order dated 3/29/16</b> set this status hearing re: proof of bond.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. <b>Need bond of \$152,500.00 or 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>
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<p><b>Reviewed by:</b> KT</p>	
	<p><b>Reviewed on:</b> 4/21/16</p>	
	<p><b>Updates:</b></p>	
	<p><b>Recommendation:</b></p>	
	<p><b>File 20- George</b></p>	

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

		See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Notice of Hearing.  2. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Maurice Sessions (Father)  3. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Paternal Grandfather - Paternal Grandmother - Siblings age 12 or older	
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			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 4/21/16	
			Updates:	
			Recommendation:	
			File 22- Robles	

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

		See petition for details.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order 4/12/16: Matter continued for service as to the parents.</b></p> <p><b>1. Petitioner filed a Declaration of Due Diligence re the father on 4/12/16. If diligence is not found, need service on the father per Probate Code §2250(e).</b></p>	
<b>Cont. from 041216</b>				
	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>			
	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>			
	<b>Aff.Mail</b>			
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
✓	<b>Pers.Serv.</b>			W
✓	<b>Conf. Screen</b>			
✓	<b>Letters</b>			
✓	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
✓	<b>9202</b>			
	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
✓	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			
			<b>Reviewed by: skc</b>	
			<b>Reviewed on: 4/21/16</b>	
			<b>Updates:</b>	
			<b>Recommendation:</b>	
			<b>File 23- Villa</b>	

Attorney Deborah K. Boyett (for Petitioner Clementina Winrow, spouse)  
 Attorney J. Stanley Teixeira (Court-appointed for proposed Conservatee)

Petition for Appointment of Temporary Conservator

		<b><u>GENERAL HEARING SET FOR 5/25/2016</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>CLEMENTINA WINROW</b> , spouse, is Petitioner and requests appointment as Conservator of the Person and Estate without bond.	<b><u>Note Re Advisement of Rights:</u></b> Court Investigator's Report filed 4/21/2016 states Investigator was unable to advise proposed Conservatee of his rights due to his being in Tracy, California; as of filing the Report, contact had not been made with proposed Conservatee by the San Joaquin County Probate Court Investigator's Office following request for courtesy interview of him in regards to the <i>Petition</i> .
		<i>~Please see Petition for details~</i>	
<b>Cont. from</b>		<i>Ex Parte Application for Good Cause Exception to Notice denied on 4/12/2016 is not summarized in notes as it is not part of the Petition for Appointment of Temporary Conservator.</i>	<b><u>Note Re Bond:</u></b> Court may require bond pursuant to Probate Code § 2320 and CA Rule of Court 7.207. Probate Code § 2321 provides Court may not waive bond without a good cause determination that proposed Conservatee will not suffer harm as a result of the waiver.
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>	<b>Court Investigator's Report was filed on 4/21/2016.</b>	<b><u>Reviewed by:</u></b> LEG
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>	<i>~Please see additional page~</i>	<b><u>Reviewed on:</u></b> 4/22/16
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	<b>9202</b>	<b><u>Updates:</u></b>
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>	<b>Order</b>	<b><u>Recommendation:</u></b>
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input checked="" type="checkbox"/>	<b>Pers.Serv.</b>	<b>Aff. Posting</b>	<b>File 24- Winrow</b>
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>	<b>Status Rpt</b>	<b><u>Citation</u></b>
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>	<b>UCCJEA</b>	<b><u>FTB Notice</u></b>
<input checked="" type="checkbox"/>	<b>Video Receipt</b>		
<input checked="" type="checkbox"/>	<b>CI Report</b>	<b>Citation</b>	<b><u>FTB Notice</u></b>
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>	<b>Aff. Posting</b>	<b><u>FTB Notice</u></b>
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>	<b>Status Rpt</b>	<b><u>FTB Notice</u></b>
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>	<b>Status Rpt</b>	<b><u>FTB Notice</u></b>
<input type="checkbox"/>	<b>FTB Notice</b>		

**24 Additional Page, Roger Emery Winrow (CONS/PE) Case No. 16CEPR00402**

**Note: If temporary *Petition* is granted and Court requires Bond, Court will set status hearing as follows:**

- **Thursday, May 26, 2016 at 9:00 a.m. in Dept. 303 for filing of proof of bond.**

Pursuant Local Rule 7.5, if the document noted above is filed prior to the date listed, the hearing will be taken off calendar and no appearance will be required.