

Seventh Account Current and Report of Conservator and Petition for Allowance of Compensation to Conservator and Attorney

		PUBLIC GUARDIAN, Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Please see petition for details.	<p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Wednesday, May 16, 2018 at 9:00 a.m. in Department 303, for the filing of the eighth account. <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>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
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<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
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<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
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<input checked="" type="checkbox"/>	Order		
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<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 4/25/16
			Updates:
			Recommendation:
			File 1- Hutton

Attorney Kevin Urbatsch, of San Francisco (for Petitioner Wells Fargo Bank, Trustee)

Probate Status Hearing Re: Filing of the Sixth and Final Account

		<p>WELLS FARGO BANK, N.A., was appointed Trustee on 12/12/2005 by <i>Order Approving Compromise of Disputed Claim, etc.</i>, filed 12/2/2005 in Fresno Superior Court case 13CECG03210.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Sixth and Final Account of the Trust or current verified status report 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.</p>
Cont. from			
	Aff.Sub.Wit.	<p>Fifth Account and Report of Trustee of the Andrew J. Reyes Trust filed on 2/27/2015 states the Trust was created for the benefit of ANDREW REYES pursuant to Order dated 12/2/2005 (minor's comp settlement to hold litigation settlement proceeds) under Probate Code § 3611(g); pursuant to the Order, this Trust is revocable by the Beneficiary when he turns age 18 on 11/6/2015; according to this mother, he is not disabled and is doing well in school.</p> <p>Order Settling Fifth Account and Report of Trustee, etc., filed 6/26/2015 set this status hearing on 4/28/2016 at 9:00 a.m. in Dept. 303 for the filing of the sixth and final account.</p> <p>Clerk's Certificate of Mailing attached to the <i>Order Settling Fifth Account</i> shows Attorney Urbatsch was mailed a copy of the 6/26/2015 <i>Order Settling Fifth Account</i> on 6/29/2015.</p>	
	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	X	
	UCCJEA		
	Citation		
	FTB Notice		
			<p>Reviewed by: LEG</p> <p>Reviewed on: 4/25/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 2- Reyes</p>

3 Damyen Daniel Montenegro Lopez (GUARD/P) Case No. 07CEPR00531

Guardian Bissegger, Reed A. (Pro Per – Maternal Grandfather – Petitioner)

Guardian Bissegger, Gracie A. (Pro Per – Maternal Grandmother – Petitioner)

Petition to Fix Residence Outside the State of California

		<p>REED and GRACIE BISSEGGER, Maternal Grandparents and Guardians, are Petitioners.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 3/10/16: Continued per request of Gracie Bissegger. The Court directs the clerk to mail Ms. Bissegger examiner notes so the defects can be cured.</p>
		<p>Petitioners were appointed guardians on 11/5/07.</p>	<p>As of 4/22/16, nothing further has been filed. The following issue remains:</p>
Cont. from 020416, 031016		<p>Father: DAVID MONTENEGRO LOPEZ Mother: CHRISTINA RODRIGUEZ Paternal Grandparents: Unknown</p>	<p>1. Need proof of service of Notice of Hearing at least 15 days prior to the hearing per Probate Code §§ 2352(c), 1460, 1511 to: - David M. Lopez (Father) - Paternal Grandparents</p>
Aff.Sub.Wit.			
✓ Verified		<p>Petitioners request the Court authorize that the residence of the minor be fixed outside the State of California to an address in Wausa, NE. Petitioners state they plan to care for their parents who are ill and make this their permanent home.</p>	<p>Note: If granted, the Court will set a status hearing for the filing of a guardianship or its equivalent in Nebraska pursuant to Probate Code §2352(d) as follows: • Thursday, August 25, 2016</p>
Inventory			
PTC		<p>There are existing visitation orders dated 10/1/09: Supervised visits with the mother; parties to mutually agree on times.</p>	<p>Reviewed by: skc</p>
Not.Cred.			
Notice of Hrg	x	<p>Duties/Supp</p>	<p>Reviewed on: 4/22/16</p>
Aff.Mail			
Aff.Pub.		<p>Objections</p>	<p>Updates:</p>
Sp.Ntc.			
Pers.Serv.		<p>Video Receipt</p>	<p>Recommendation:</p>
Conf. Screen			
Letters		<p>CI Report</p>	<p>File 3-Lopez</p>
Duties/Supp			
Objections		<p>9202</p>	
Video Receipt			
CI Report		<p>✓ Order</p>	
9202			
✓ Order		<p>Aff. Posting</p>	
Aff. Posting			
Status Rpt		<p>UCCJEA</p>	
UCCJEA			
Citation		<p>Citation</p>	
FTB Notice			

4 Adalina Anna Marie Carson (GUARD/P)

Case No. 10CEPR00192

Guardian: Treva Marie Eubanks (Pro per – Maternal great-grandmother)

Petitioner: Kimberly Michelle Jones (Pro per – Non-relative)

Petition for Appointment of Successor Co-guardian of the Person

		<p>TREVA EUBANKS and KIMBERLY JONES, guardian/maternal great grandma and non-relative, are petitioners</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of personal service 15 days prior to hearing of <i>Notice of Hearing</i> with copy of petition <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence for: <ol style="list-style-type: none"> a. Breanna Smith (mother) 3. Need proof of mailed service 15 days prior to hearing of <i>Notice of Hearing</i> with copy of petition <u>or</u> consents and waivers of notice <u>or</u> declarations of due diligence for: <ol style="list-style-type: none"> a. Paternal grandparents b. Tammy Smith (maternal grandmother) 4. Need proof of service 15 days prior to hearing with copy of petition on Central Valley Regional Center (CVRC). 	
		<p>TREVA EUBANKS and GEORGE EUBANKS were appointed co-guardians in 2010. George Eubanks is recently deceased.</p>		
Cont. from		<p>DSS Social Worker Irma Ramirez' report filed.</p>		
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified	<p><i>See petition for details.</i></p>		
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			X
<input type="checkbox"/>	Aff.Mail			X
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			X
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	DSS Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			<p>Reviewed by: SEF</p>	
			<p>Reviewed on: 4/25/2016</p>	
			<p>Updates:</p>	
			<p>Recommendation:</p>	
			<p>File 4- Carson</p>	

First and Final Account and Petition for Final Distribution and for Allowance of Statutory and Extraordinary Compensation and Reimbursement of Costs

DOD: 12/19/12	MINDY SHIRLEY , Second Successor Administrator, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>OFF CALENDAR. Amended Petition filed and set for hearing on 5/31/16</p>
	Account period: 4/14/13 – 1/5/16	
Cont. from 032416	Accounting - \$415,453.86	
Aff.Sub.Wit.	Beginning POH - \$392,636.95	
Verified	Ending POH - \$348,017.88	
Inventory	Administrator - \$11,309.00	
PTC	(greater than statutory, see note #2, split between Petitioner and the two prior Administrators)	
Not.Cred.		
Notice of Hrg		
Aff.Mail	Attorney - \$11,309.00	
Aff.Pub.	(greater than statutory, see note #2)	
Sp.Ntc.		
Pers.Serv.	Attorney x/o - \$14,656.00	
Conf. Screen	(for back taxes, sale of real and personal property and the appointment of two successor administrator.)	
Letters		
Duties/Supp	Proposed distribution appears to be incorrect based on #9 of the Needs/Problems and Comments.	
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 4/25/16
		Updates:
		Recommendation:
		File 5- Sanchez

**6 Julissa Contreras, Arianna Contreras, Danny Cabrera and Ramon Contreras
(GUARD/P) Case No. 13CEPR00234**

Petitioner Contreras, Ramon Victor (Pro Per – Father)
Objector Martinez, Patricia (Pro Per – Co-Guardian)
Objector Gomez, Candice (Pro Per – Co-Guardian)

Probate Status Hearing RE: Visits and Report from Court Investigator

Julissa age: 12	<p>RAMON VICTOR CONTRERAS, father, petitioned the Court for Visitation on 09/01/2015. Hearing was set for 10/08/2015, at the hearing the Court continued the matter to 11/19/2015. At the 11/19/2015 hearing, the Court continued the hearing to 01/21/2016.</p> <p>PATRICIA MARTINEZ, maternal grandmother, and CANDICE GOMEZ, maternal aunt, were appointed guardians on 05/28/2013. Objections to the Petition for Visitation were filed 10/05/2016.</p> <p>Minute Order of 01/21/2016 set this Status Hearing re: Visits and Report from Court Investigator. Minute Order states: The Court finds the Declaration of Due Diligence as to John Cabrera is insufficient, and all parties are admonished, especially Mr. Ruiz and Ramon Contreras, that notice to John Cabrera is not dispensed with for future hearings. The Court orders supervised visits, per the agreement of all parties, every other Saturday beginning 01/30/2016, from 1pm to 3pm at the Trolley Car Park, supervised by at least one of the co-guardians or Patrick Ortiz. Furthermore, no other parties shall be present at the visits. The Court orders the Court Investigator to interview all of the minors, the co-guardians, and Ramon Contreras and report back to the Court with regard to the visits for the 04/28/2016 hearing. Mr. Ruiz will submit order.</p> <p>Court Investigator report filed 04/22/2016.</p>	NEEDS/PROBLEMS/COMMENTS:
Ariana age: 10		
Danny age: 8		
Ramon age: 6		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 04/26/2016
		Updates:
		Recommendation:
		File 6- Contreras & Cabrera

Petition for Approval of Third and Final Account and Report of Temporary Conservator of the Estate; Request for Approval of Payment of Temporary Conservator's Fees; Request for Approval of Payment of Conservator's Attorney's Fees; and Discharge of Temporary Conservator of the Estate

	BRUCE BICKEL , Temporary Conservator of the Estate, is Petitioner.		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: On 3/15/16, temporary conservatorship was extended to 5/3/16 and the status hearing was continued to 5/3/16.</p> <ol style="list-style-type: none"> Attorney requests \$435 in costs plus an estimated \$550 in time in connection with a petition to confirm arbitration award, which has not yet been filed. Need clarification. Need order.
	Account period: 5/1/15 through 1/15/16		
	Accounting: \$589,077.95		
	Beginning POH: \$568,498.67		
	Ending POH: \$0.00		
	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	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

The assets of the conservatorship estate were transferred to Comerica Bank & Trust, N.A., successor trustee of the Loeffler Family Trust, on 1/6/16 pursuant to Order of 11/13/15.

Conservator: \$8,673.00 (\$7,443.00 for 61.10+ hours by Temporary Conservator and those under his direct supervision from 6/1/15 through 3/11/16 as set forth in Declaration of Bruce Bickel, plus \$1,230.00 for an additional 8.5 hours as set forth in Supplemental Declaration.)

Attorney (Dowling Aaron): \$13,530.00 (\$6,710.00 for 24.40+ hours of attorney time was expended in advising the Temporary Conservator from 8/30/15 through 3/13/16, plus \$6,820.00 as set forth in Declaration of Summer A. Johnson.)

Costs (Dowling Aaron): \$1,389.00 (filing, service, court reporter)

Attorney (Bagdasarian): \$1,595.00 (The former attorney for Linda Plitt has requested payment for the period of 8/7/15 through 12/1/15 per attached final billing statement.

Pursuant to the terms of the settlement agreement, after transition of the assets of the conservatorship estate to the successor trustee Comerica Bank & Trust, N.A., Petitioner is to be discharged as Conservator of the Estates of Fred and Kathleen Loeffler. Petitioner requests that upon approval of this final account and report that conservatorship be terminated and Petitioner be discharged as Conservator of the Estate of Fred O. Loeffler.

SEE ADDITIONAL PAGES

Reviewed by: skc
Reviewed on: 4/26/16
Updates:
Recommendation:
File 7- Loeffler

Page 2

Supplement to Petition filed 4/13/16 states Petitioner is presently the Representative Payee with respect to Dr. Loeffler's monthly Social Security payment, which is sent by check to Petitioner, and Petitioner forwards it to Comerica Bank & Trust, N.A., successor trustee of the Loeffler Family Trust. Pursuant to the settlement agreement, Petitioner shall transfer all assets under his control to Comerica Bank upon approval of the accounts. In an effort to finalize transition of all financial matters to Comerica Bank, Petitioner has spoken with Comerica Bank, who will accept direct deposit of the social security payments to the Loeffler Family Trust accounts; however, they presently cannot accept the direct deposit with a representative payee from Social Security.

Consequently, Petitioner requests an order from the Court removing Petitioner as the Representative Payee on the Conservatee's Social Security payment and directing that the payments be direct deposited into a specified Comerica Bank checking account.

Additionally, arbitration occurred on 3/26/16 concerning implementation of two items from the settlement agreement – execution of advance healthcare directive naming a neutral third party and limited durable power of attorney naming Comerica Bank & Trust, N.A., as the agent for purposes of filing Dr. Loeffler's tax returns and managing his IRA. Dr. Loeffler did not agree to the appointment of a neutral agent and did not execute a limited DPOA. On 3/26/16, Arbitrator Judge Howard R. Broadman (Ret.) ordered that Ms. Johnson prepare and circulate a proposed arbitration award on or before 4/1/16. As relevant herein, Judge Broadman found the following:

- a. Marion Austin would serve as the agent under an Advance Healthcare Directive on behalf of Dr. Loeffler, the terms of which are incorporated into the Arbitration Award;
- b. Comerica Bank & Trust, N.A., would serve as attorney-in-fact or agent under a Limited DPOA on behalf of Dr. Loeffler, the terms of which are incorporated into the Arbitration Award;
- c. Attorney's fees and costs were awarded to prevailing parties.

The proposed Arbitration Award was drafted by Ms. Johnson and served on all parties, counsel and interested persons on 4/1/16 as ordered by Judge Broadman. Objections or revisions were due on or before 4/11/16. Ms. Johnson prepared, filed and served a correction to the proposed award which reflected a reduction in the amount of fees requested to be awarded to prevailing party Diane Huerta as a result of a clarification from Ms. Huerta's counsel re calculation of the attorney fees.

Mick Loeffler, Dr. Loeffler, and Mrs. Loeffler served written objections to the proposed arbitration award and each of Judge Broadman's rulings therein.

A copy of the revised Proposed Arbitration Award is attached as Exhibit A. As relevant to this supplement, Judge Broadman awarded Mr. Bickel and his attorney, Ms. Johnson, their fees and costs incurred in preparing for and attending the arbitration, subject to application to and approval by the Court.

Petitioner has been informed by Ms. Johnson that a Petition to Confirm the Arbitration Award will need to be filed ten (10) days following execution of the Arbitration Award by the Arbitrator.

Petitioner describes the supplemental compensation requested herein (included and described on Page 1).

SEE ADDITIONAL PAGES

Page 3

Petitioner requests an order that:

1. The Third and Final Account and Report be settled, allowed, and approved as rendered, and all acts and transactions of Bruce D. Bickel as Temporary Conservator off the Estate set forth in it, or relating to matters set for in it, be ratified, confirmed and approved;
2. The property on hand at the end of the account period is: \$0;
3. Petitioner be removed as the representative payee with respect to Fred Otto Loeffler's Social Security payment and Fred Otto Loeffler's Social Security payment be direct deposited into the specified Comerica Bank checking account;
4. Comerica Bank & Trust, N.A., be authorized and directed to pay directly to Bruce D. Bickel the amount of \$8,673.00 for services rendered as Temporary Conservator of the Estate;
5. Comerica Bank & Trust, N.A., be authorized and directed to pay directly to Dowling Aaron Incorporated \$13,530.00 for legal services rendered to the Temporary Conservator of the Estate;
6. Comerica Bank & Trust, N.A., be authorized and directed to pay directly to Dowling Aaron Incorporated \$1,389.00 for costs advanced on behalf of the Temporary Conservator of the Estate;
7. Comerica Bank & Trust, N.A., be authorized and directed to pay Gary Bagdasarian reasonable attorney's fees in an amount approved by the Court;
8. The Conservatorship be terminated and upon entry of the order approving the petition, the conservator be discharged and released from all liability to be incurred hereafter;
9. Upon entry of the order approving the petition, Petitioner's surety be released and discharged effective as of 1/6/16, the date upon which Petitioner delivered the Conservatorship Estate to Comerica Bank & Trust, N.A.; and
10. Any and all such other further orders as the Court considers proper.

Petition for Approval of Third and Final Account and Report of Temporary Conservator of the Estate; Request for Approval of Payment of Temporary Conservator's Fees; Request for Approval of Payment of Conservator's Attorney's Fees; and Discharge of Temporary Conservator of the Estate

		BRUCE BICKEL , Temporary Conservator of the Estate, is Petitioner.	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Note: On 3/15/16, temporary conservatorship was extended to 5/3/16 and the status hearing was continued to 5/3/16.</p> <p>3. Attorney requests \$435 in costs plus an estimated \$550 in time in connection with a petition to confirm arbitration award, which has not yet been filed. Need clarification.</p> <p>4. Need order.</p> <p>Reviewed by: skc Reviewed on: 4/26/16 Updates: Recommendation: File 8- Loeffler</p>
		Account period: 5/1/15 through 1/15/16 Accounting: \$32,059.47 Beginning POH: \$26,162.75 Ending POH: \$755.00 (cash)	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory	With the exception of one account, the assets of the conservatorship estate were transferred to Comerica Bank & Trust, N.A., successor trustee of the Loeffler Family Trust, on 1/6/16 pursuant to Order of 11/13/15.	
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	Conservator: \$8,950.50 (\$7,660.50 for 62.65+ hours by Temporary Conservator and those under his direct supervision from 6/1/15 through 3/11/16 as set forth in Declaration of Bruce Bickel, plus \$1,290.00 for an additional 8.9 hours as set forth in Supplemental Declaration.)	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp	Attorney (Dowling Aaron): \$13,007.00 (\$7,067.00 for 25.70+ hours of attorney time was expended in advising the Temporary Conservator from 8/30/15 through 3/13/16, plus \$5,940.00 as set forth in Declaration of Summer A. Johnson.)	
	Objections		
	Video Receipt		
	CI Report	Costs (Dowling Aaron): \$1,109.75 (filing, service, court reporter)	
	9202		
✓	Order	Pursuant to the terms of the settlement agreement, after transition of the assets of the conservatorship estate to the successor trustee Comerica Bank & Trust, N.A., Petitioner is to be discharged as Conservator of the Estates of Fred and Kathleen Loeffler. Petitioner requests that upon approval of this final account and report that conservatorship be terminated and Petitioner be discharged as Conservator of the Estate of Kathleen D. Loeffler.	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
SEE ADDITIONAL PAGES			

Page 2

Supplement to Petition filed 4/13/16 states Petitioner is presently the Representative Payee with respect to Mrs. Loeffler's monthly Social Security payment, which is deposited to a Union Bank account and Petitioner then sends a check payment to Comerica Bank & Trust, N.A., successor trustee of the Loeffler Family Trust. Pursuant to the settlement agreement, Petitioner shall transfer all assets under his control to Comerica Bank upon approval of the accounts. In an effort to finalize transition of all financial matters to Comerica Bank, Petitioner has spoken with Comerica Bank, who will accept direct deposit of the social security payments to the Loeffler Family Trust accounts; however, they presently cannot accept the direct deposit with a representative payee from Social Security.

Consequently, Petitioner requests an order from the Court removing Petitioner as the Representative Payee on the Conservatee's Social Security payment and directing that the payments be direct deposited into a specified Comerica Bank checking account.

Additionally, arbitration occurred on 3/26/16 concerning implementation of two items from the settlement agreement – execution of advance healthcare directive naming a neutral third party and limited durable power of attorney naming Comerica Bank & Trust, N.A., as the agent for purposes of filing Mrs. Loeffler's tax returns and managing his IRA. Mrs. Loeffler did not agree to the appointment of a neutral agent and did not execute a limited DPOA. On 3/26/16, Arbitrator Judge Howard R. Broadman (Ret.) ordered that Ms. Johnson prepare and circulate a proposed arbitration award on or before 4/1/16. As relevant herein, Judge Broadman found the following:

- d. Marion Austin would serve as the agent under an Advance Healthcare Directive on behalf of Mrs. Loeffler, the terms of which are incorporated into the Arbitration Award;
- e. Comerica Bank & Trust, N.A., would serve as attorney-in-fact or agent under a Limited DPOA on behalf of Mrs. Loeffler, the terms of which are incorporated into the Arbitration Award;
- f. Attorney's fees and costs were awarded to prevailing parties.

The proposed Arbitration Award was drafted by Ms. Johnson and served on all parties, counsel and interested persons on 4/1/16 as ordered by Judge Broadman. Objections or revisions were due on or before 4/11/16. Ms. Johnson prepared, filed and served a correction to the proposed award which reflected a reduction in the amount of fees requested to be awarded to prevailing party Diane Huerta as a result of a clarification from Ms. Huerta's counsel re calculation of the attorney fees.

Mick Loeffler, Dr. Loeffler, and Mrs. Loeffler served written objections to the proposed arbitration award and each of Judge Broadman's rulings therein.

A copy of the revised Proposed Arbitration Award is attached as Exhibit A. As relevant to this supplement, Judge Broadman awarded Mr. Bickel and his attorney, Ms. Johnson, their fees and costs incurred in preparing for and attending the arbitration, subject to application to and approval by the Court.

Petitioner has been informed by Ms. Johnson that a Petition to Confirm the Arbitration Award will need to be filed ten (10) days following execution of the Arbitration Award by the Arbitrator.

Petitioner describes the supplemental compensation requested herein (included and described on Page 1).

SEE ADDITIONAL PAGES

Dept. 303, 9:00 a.m. Thursday, April 28, 2016

Petitioner requests an order that:

11. The Third and Final Account and Report be settled, allowed, and approved as rendered, and all acts and transactions of Bruce D. Bickel as Temporary Conservator off the Estate set forth in it, or relating to matters set for in it, be ratified, confirmed and approved;
12. The property on hand at the end of the account period is: \$755 (cash);
13. Petitioner be removed as the representative payee with respect to Kathleen Doris Loeffler's Social Security payment and Kathleen Doris Loeffler's Social Security payment be direct deposited into the specified Comerica Bank checking account;
14. Comerica Bank & Trust, N.A., be authorized and directed to pay directly to Bruce D. Bickel the amount of \$8,950.50 for services rendered as Temporary Conservator of the Estate;
15. Comerica Bank & Trust, N.A., be authorized and directed to pay directly to Dowling Aaron Incorporated \$13,007.00 for legal services rendered to the Temporary Conservator of the Estate;
16. Comerica Bank & Trust, N.A., be authorized and directed to pay directly to Dowling Aaron Incorporated \$1,109.75 for costs advanced on behalf of the Temporary Conservator of the Estate;
17. The Conservatorship be terminated and upon entry of the order approving the petition, the conservator be discharged and released from all liability to be incurred hereafter;
18. Upon entry of the order approving the petition, Petitioner's surety be released and discharged effective as of 1/6/16, the date upon which Petitioner delivered the Conservatorship Estate to Comerica Bank & Trust, N.A.; and
19. Any and all such other further orders as the Court considers proper.

Petition for Approval of Third and Final Account and Report of Temporary Trustee; Request for Approval of Payment of Trustee's Attorney's Fees; and Discharge of Temporary Trustee

	BRUCE BICKEL , Temporary Trustee, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need order.</p> <hr/> <p>Reviewed by: skc</p> <p>Reviewed on: 4/26/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 9- Loeffler</p>
	Account period: 5/1/15 through 1/15/16 Accounting: \$961,003.42 Beginning POH: \$855,691.54 Ending POH: \$19.29 (cash)	
<input type="checkbox"/>	Aff.Sub.Wit.	
<input checked="" type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input checked="" type="checkbox"/>	Notice of Hrg	
<input checked="" type="checkbox"/>	Aff.Mail	
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input type="checkbox"/>	Pers.Serv.	
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input checked="" type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
	<p>Petitioner as temporary trustee has charged all of his time between the two pending conservatorship matters and requests no fee for his services as temporary trustee of the Loeffler Family Trust.</p> <p>Attorney: \$7,019.00 (\$6,390.00 for 23.24+ attorney hours in connection with advising the temporary trustee as set forth in declaration, plus \$629.00 (filing, service))</p> <p>Petitioner states the Court's order of 11/13/15 authorized him to transfer the assets to the successor trustee, Comerica Bank & Trust, N.A., which transfer was substantially complete on 1/6/16. The final transfer of \$19.29 was transferred to the successor trustee on 2/1/16, which completed the transfer of trust assets to Comerica Bank & Trust, N.A.</p> <p>The settlement agreement requires that the parties agree on the appointment of a neutral third party to serve as the agent under an advance healthcare directive as well as execution of a limited durable power of attorney naming Comerica Bank & Trust, N.A., as agent for purposes of filing Dr. and Mrs. Loeffler's tax returns and managing the IRA. Dr. and Mrs. Loeffler have not agreed to the appointment of an agent and have not executed a limited DPOA appointing Comerica Bank & Trust as agent. An arbitration was scheduled for 3/26/16 before Arbitrator Judge Howard R. Broadman (Ret.).</p> <p>Petitioner requests an Order that:</p> <ol style="list-style-type: none"> 1. The Third and Final Account and Report be settled, allowed, and approved as rendered, and all acts and transactions of Bruce D. Bickel as Temporary Trustee off the Loeffler Family Trust set forth in it, or relating to matters set for in it, be ratified, confirmed and approved; 2. Comerica Bank & Trust, N.A., be authorized and directed to pay directly to Dowling Aaron Incorporated \$7,019.00 for legal services and costs rendered to the Temporary Trustee; 3. Upon entry of the Order approving the petition, Petitioner be discharged as Temporary Trustee and released from all liability to be incurred hereafter; and 4. Any and all such other further orders as the Court considers proper. 	

DOD: 11/25/2012	<p>EUSTOLIA CAMACHO, surviving spouse, was appointed Administrator with full IAEA authority without bond on 04/28/2014.</p> <p>Letters issued on 04/29/2014</p> <p>Inventory and Appraisal filed 01/30/2015 shows an estate valued at \$743,000.00.</p> <p>Minute Order of 04/28/2014 set this matter for hearing for the filing of the First Account.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR</u> <u>Order Terminating</u> <u>Proceedings Because of</u> <u>No Assets and to</u> <u>Discharge Administrator</u> <u>signed 04/19/2016.</u></p>
Cont. from 060515, 102815, 120215, 012816		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 04/25/2016
		Updates:
		Recommendation:
		File 10 - Camacho

Attorney James J. Mele (for Petitioner Juan Carlos Valencia, Jr.)

First Account and Report and Petition for Settlement of First Account and Report

DOD: 3/21/2014		JUAN CARLOS VALENCIA, JR. , son and Executor, is Petitioner.	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Note Re Closing the Estate: Based upon Petitioner's statement that the estate will not be ready to close until the payment in full of the Note Secured by Deed of Trust scheduled for payoff on 4/1/2017, Court will set a status hearing as follows for the filing of the final account and petition for final distribution:</p> <ul style="list-style-type: none"> Monday, May 1, 2017, at 9:00 a.m. in Dept. 303. <p>Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the date listed, the hearing will be taken off calendar and no appearance will be required.</p>
Cont. from			
	Aff.Sub.Wit.	Accounting - \$200,811.82	
✓	Verified	Beginning POH - \$200,000.00	
✓	Inventory	Ending POH - \$ 50,825.16 <i>(all cash)</i>	
✓	PTC	Executor - Not requested at this time <i>(statutory)</i>	
✓	Not.Cred.		
✓	Notice of Hrg	Attorney - Not requested at this time <i>(statutory)</i>	
✓	Aff.Mail	W / O	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters	071014	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
✓	FTB Notice		

Attorney Shepard, Jeff S. (for Raynette Grant – Executor – Petitioner)

Objector Dunn, Robyn R. (Pro Per – Daughter)

First Account and Report of Administration and Petition for Settlement

DOD: 09/25/2014		RAYNETTE GRANT , Executor, is petitioner.	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Minute Order of 03/03/2016: The Court orders any new and updated objections are to be filed and properly served by 03/24/2016, or the Court will not consider them. Any reply is due by 04/07/2016. This is the last continuance, and the Court will rule on 04/28/2016, absent extraordinary good cause.</p> <p>For Objector:</p> <ol style="list-style-type: none"> Objection to First Accounting filed 03/25/2016 does not appear to have been served on Attorney Jeff S. Shepard. Need proof of service of Objection to First Accounting filed 03/25/2016.
		Account period 09/25/2014 to 12/15/2015	
		Accounting - \$162,262.93	
		Beginning POH - \$113,395.69	
		Ending POH - \$114,660.43 (\$46,604.43 is cash)	
Cont. from 012816, 030316		<p>Petition states the estate is not in a condition to be closed for the following reason:</p> <p>By the terms of the will of the deceased, the residue of the estate is devised and bequeathed in percentage amounts of twenty (20% each to four heirs/beneficiaries, ten (10%) to one heir and five (5%) percent to two heirs. The remaining asset of decedent's estate is forty (40%) interest in a condominium which makes it impractical to distribute in kind. The condominium has been listed with a real estate broker for sale; no acceptable offers have been received.</p> <p>Wherefore, petitioner prays for an order and judgment as follows:</p> <ol style="list-style-type: none"> Settling and allowing the first account and report as filed; Ratifying, confirming and approving all of the acts and transactions of petitioner as executor; Making such further order as the Court deems proper. <p style="text-align: center;"><u>Please see additional page</u></p>	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input checked="" 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 checked="" type="checkbox"/>	Letters 10/16/14		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
		Reviewed by: LV	
		Reviewed on: 04/26/2016	
		Updates:	
		Recommendation:	
		File 13- Rowley	

Objection to First Account filed by Robyn Dunn on 01/13/2016 states she hereby objects to the First Account and Petition for Settlement as Follows:

1. Decedent's property located at 2648 N. Armstrong Fresno, Ca. and noted in Will is not present.
2. Monaco Mobile Home Documentation.
3. Decedent's Property located at Lot 18 of Tract N476 W. Barstow #101 Documentation as to holding of other 60%
4. Income from Rental Property located at 476 W. Barstow #101 08/01/2014 to 07/01/2015.
5. Raye Grant, Executor has not acted impartially in her role as Executor of Will and Distribution of the Estate.
6. Many items were removed from the property prior to appraisals.

Response to First Accounting Objection filed 01/21/2016 by Attorney Jeff S. Sheppard states the decedent included in his will real property located at 2648 N. Armstrong, Fresno, Ca. 93727. However, in 2002, decedent sold said real property to Raynette R. Grant as Trustee of the Raynette R. Grant Family Trust dated 10/01/2001. The decedent's personal property located at 2648 N. Armstrong was sold at auction and proceeds are shown in Receipts, Schedule B, Page 3 of the accounting.

The Monaco motor (mobile) home had been disposed of by decedent prior to his death; a copy of the Oregon Vehicle Certificate of Title processed 090408 from Decedent to Diana Lynn Tompkins and Austin Jay Rowley is attached as Exhibit B.

A copy of the Grant Deed for the real property described by objector as Lot 18 of Tract 2607 LaVille Barstow, No 101, Fresno to Fred Rowley, an unmarried man, as to an undivided 40 percent and Raynette Grant, an unmarried woman, as to an undivided 60 percent, is attached as Exhibit C.

The rental income was inadvertently omitted from the accounting; a Declaration Correcting First Account and Report of Administration and Petition for Settlement is being filed concurrently herewith and a copy is attached as Exhibit D.

Nothing has been distributed except specific personal items the decedent set forth in his will; these were distributed prior to the auction to save the estate the expense of protecting them.

Objector, Robyn R. Dunn, was on the property many times. Objector knew the auction date and affirmed that she would tell her children. Objector was at the property the morning of the auction date. The auction date was advertised in the Fresno Bee and online prior to the sale date. There is no specific list of items objector says were removed prior to appraisals to petitioner cannot respond further.

Please see additional page

Objection to First Account filed 03/25/2016 filed by Robyn Dunn on 03/25/2016 states:

- Decedent's property located at 2648 N. Armstrong, Fresno, Ca. Grant deed stated to Raye Grant as Trustee of the Raynette R. Grant Family Trust under Declaration of Trust dated 10/01/2001. Fred Rowley was her family. We request the documents be reviewed by the judge or examiner. It also states see Exhibit one attached hereto and made a part hereof and there is no attachment one.
- The amount of \$10,636 paid for clean-up and removal of trash, etc. is extremely excessive. Ms. Dunn believes this was used for preparing the property for sale not removal of property and she denied to help.
- The document shown for the Monaco Motorhome shows Diane Tompkins and Austin Rowley as registered owners. Fred Rowley and Raye Grant as legal owners. Not a transfer document.
- Ms. Dunn asks to possibly rent out the property at 476 Barstow #101, Fresno until it is sold.
- Raye Grant stated that only specific personal items the decedent set forth in his will were distributed prior to auction. No where on the will does it state any personal items to be distributed differently, except the motorhome. Diane Tompkins and Austin Rowley stayed on the property for 3 different occasions totaling of 2 ½ weeks. They removed truckloads and trailers filled with deceased property that needs to be calculated into their share.
- Other items removed prior to auction:
 - A sealed Warbonnet Lionel Train Set, Long Hauler, Diesel Hustler & Fire Builder Electric Train set – (Adam Richardson's property)
 - 1948 Chevrolet Stylemaster Coupe request DMV transfer date.
- Nothing has been handled fairly since Raye Grant became executor. We just request this case be carefully examined.

Status Report by Attorney Jeff S. Shepard filed on 04/07/2016 states a first account and report was filed on 12/07/2015. An objection to first accounting by Robyn R. Dunn, was filed 01/13/2016. A response to first accounting objection was filed 01/21/2016; all objections have been addressed. There has been no correspondence, notice or documents received by the Executor of the Estate, Raye Grant, or by Attorney Shepard from Robyn Dunn, since the status hearing held 03/03/2016. The estate is not currently in a condition to be closed, however, an offer for purchase of the real property in which the estate owns an undivided forty (40%) percent interest, has been received. A notice of proposed action has been sent to all persons interested in the estate.

Attorney Darlene Azevedo Kelly (for Brian J. Griffin – Executor)

Probate Status Hearing Re: First Account and/or Petition for Final Distribution

DOD: 05/25/14	BRIAN J. GRIFFIN , nephew, was appointed Executor without bond and with full IAEA on 10/23/14.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;">OFF CALENDAR</p> <p><i>First and Final Account and Report of Executor and Petition for its Settlement, for Allowance of Commissions and Fees and for Final Distribution filed 4/26/2016 is set for hearing on <u>6/7/2016</u>.</i></p> <p><u>Continued from 3/24/2016.</u></p> <p>1. Need First/Final Account and Petition for Final Distribution.</p>
	Minute Order from hearing on 10/23/14 set the matter for a status hearing regarding filing of the First Account and/or Petition for Final Distribution on 01/21/16.	
Cont. from 012116, 032416	Inventory & Appraisal filed 03/18/15 \$113,000.00	
Aff.Sub.Wit.	<p>Declaration of Darlene Azevedo Kelly in Support of Request for Continuance of Status Hearing Regarding Filing of the First Account and/or Petition for Final Distribution, filed 3/16/2017 for the previous status hearing on 3/24/2016, states:</p> <ul style="list-style-type: none"> The attorney previously assigned to prepare the final account [Philip Martinez] has left the firm without completing the documents; She has been working on the first and final account and petition for distribution since it was assigned to her 2 weeks ago; She has received from the Executor much of the information necessary to complete the account and has completed a draft; She has been delayed in completing the document because she has conducted a search for two of the beneficiaries who have not been located, and because the Executor resides in Aromas, it is more difficult and time consuming for her to communicate and exchange documents with him; On 3/15/2016, she learned that an immediate family member had died, which necessitates her being out of state for at least the next week, thus delaying her ability to complete the document; Accordingly, she requests the status hearing be continued for 30 days. 	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<p>Reviewed by: JF / LEG</p> <p>Reviewed on: 4/25/16</p> <p>Updates: 4/26/16</p> <p>Recommendation:</p> <p>File 14- Griffin</p>

Age: 15		MARIA GUADALUPE VALENCIA , Guardian, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Need Amended Accounting based on the following: Account must start with the Inventory and Appraisal Value. Inventory and Appraisal filed 03/16/2015 shows estate valued at \$25,000.00. Real Property was sold therefore need Escrow statements pursuant to Probate Code § 2620 (c)(4). Attorney requests reimbursement of \$79 which is described as Legal Action, this appears to be an expense of doing business pursuant to Local Rule 7.17 (b)(7).
		Account period: 01/13/2015 to 12/31/2015	
Cont. from		Accounting - \$12,638.09	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$5.00	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$11,643.09	
<input type="checkbox"/>	Inventory	Guardian - Waives	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.	Attorney - \$2,889.00	
<input checked="" type="checkbox"/>	Notice of Hrg	(per declaration and itemization for, for 10.5 hours at \$275/hr. Declaration lists 14.8 hours worked but has chosen to charge for a portion of Attorney time spent)	
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	Attorney Reimbursement - \$1,111.00	
<input type="checkbox"/>	Conf. Screen	(filing fees, Legal Action)	
<input checked="" type="checkbox"/>	Letters	01/13/15	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
<p>Petitioner prays for an Order:</p> <ol style="list-style-type: none"> The Court issue an Order approving, allowing and settling the First Account and Report by the Guardian in all respects; The Court authorize Petitioner to pay her attorney \$2889.00, as reasonable value of services rendered to her, and \$1,111.00 for allowable costs advanced for her, for a total of \$4,000.00; and Such other relief as the Court considers reasonable and proper. 			
Reviewed by: LV			
Reviewed on: 04/26/2016			
Updates:			
Recommendation:			
File 15- Patino			

First and Final Report of Administrator; Petition for Final Distribution without an Accounting and for Allowance of Compensation for Ordinary Services

DOD: 3/21/15	GLENN HOWELL , Administrator, is petition.	NEEDS/PROBLEMS/COMMENTS: 1. Petition does not contain a statement regarding whether or not notice to the Franchise Tax Board was performed, as required by Probate Code 9202(c)(1).
	Accounting is waived.	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.	I & A - \$215,763.68	
<input checked="" type="checkbox"/> Verified	POH - \$117,080.34	
<input checked="" type="checkbox"/> Inventory	Administrator - waives	
<input checked="" type="checkbox"/> PTC	Attorney - \$7,781.89	
<input checked="" type="checkbox"/> Not.Cred.	(statutory)	
<input checked="" type="checkbox"/> Notice of Hrg	Closing - \$1,000.00	
<input checked="" type="checkbox"/> Aff.Mail W/		
<input type="checkbox"/> Aff.Pub.	Distribution, pursuant to intestate succession, is to:	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Richard Howell - \$54,149.23	
<input type="checkbox"/> Conf. Screen	Dorathy Howell - \$54,149.23	
<input checked="" type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice X		
		Reviewed by: KT
		Reviewed on: 4/25/16
		Updates:
		Recommendation:
		File 16- Howell

17 Gladys Cotton (CONS/PE) Case No. 15CEPR00540

Attorney Kruthers, Heather H (for Public Guardian)

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

	PUBLIC GUARDIAN , is petitioner.		NEEDS/PROBLEMS/COMMENTS:
	Sale price - \$64,000.00 Overbid - \$67,700.00		
	Reappraisal - \$65,000.00		
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" 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 checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input checked="" type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Publication: The Business Journal
			Buyers – Sofia Escareno & Sabrina Escareno, as joint tenants
			Broker - \$3,200.00 (50% to Jeff Starbuck of Guarantee Real Estate and 50% to Mireya Lazaro of Home Star Real Estate)
			Reviewed by: LV
			Reviewed on: 04/26/2016
			Updates:
			Recommendation:
			File 17- Cotton

Probate Status Hearing RE: Filing of the Final Inventory and Appraisal

Age:			NEEDS/PROBLEMS/COMMENTS:	
DOD:				
Cont. from				<u>OFF CALENDAR</u> Final I&A filed 4/19/16
	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	Reviewed by: skc		
	Status Rpt	Reviewed on: 4/22/16		
	UCCJEA	Updates:		
	Citation	Recommendation:		
	FTB Notice	File 18- Rottsolk		

Petition for Appointment of Probate Conservator of the Person

		<p>See petition for details.</p>	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Court Investigator advised rights on 2/11/16</p> <p>Voting rights affected – need minute order.</p> <p><u>Minute Order 4/14/16:</u> Ms. Amador represent that her client is not seeking dementia or placement powers at this time. Counsel is to file a declaration of due diligence regarding the siblings at least two court days prior to 4/28/16.</p> <p>The following issues remain noted:</p> <ol style="list-style-type: none"> 1. Petitioner filed a declaration of due diligence on 4/19/16 regarding notice to the proposed conservatee’s siblings. If diligence is not found, need proof of notice. 	
Cont. from 030316, 041416				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			W
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input checked="" type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input checked="" type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p>Reviewed by: skc</p> <p>Reviewed on: 4/22/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 19- Hernandez</p>		

Petition for Appointment of Guardian of the Person

		<u>TEMPORARY EXPIRES 4/28/16</u>	NEEDS/PROBLEMS/COMMENTS:
		NORMA HOLLAND , great aunt, is petitioner	
		Court Investigator report filed 4/20/16.	<p>1. Need proof of mailed service 15 days before the hearing of <i>Notice of Hearing</i> along with a copy of the petition <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence for paternal grandparents.</p>
Cont. from		<i>See petition for details.</i>	
<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 type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv. w/		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: SEF
			Reviewed on: 4/25/16
			Updates:
			Recommendation:
			File 20- Markhem-Holland

21 Richie Bugarin (GUARD/P)

Case No. 16CEPR00210

Petitioner: Teresa Diane Powers (Pro Per)

Petitioner: Daniel Lee Powers (Pro Per)

Petition for Appointment of Guardian of the Person

		<u>TEMPORARY DENIED</u>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. <i>Notice of Hearing</i> filed 3/8/15 for general guardianship hearing lists incorrect hearing date at item 4 (i.e., 3/10/16 versus 4/28/16). Need proof of mailed service of <i>Notice of Hearing</i> with correct hearing date along with a copy of the petition at least 15 days prior to the hearing <u>or</u> consents and waivers of notice <u>or</u> declaration of due diligence for:</p> <ul style="list-style-type: none"> a. Anthony Bugarin Sr. (paternal grandfather) b. Mica Flores (maternal grandmother) c. Maternal grandfather
		<p>TERESA POWERS (paternal grandmother) and DANIEL POWERS (paternal step-grandfather) are petitioners</p> <p>Court Investigator report filed 4/21/2016.</p> <p>See petition for details.</p>	
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	n/a	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed by: SEF	
		Reviewed on: 4/26/16	
		Updates:	
		Recommendation:	
		File 21- Bugarin	

Petition to Determine Succession to Real Property

DOD: 12/6/15	CATHLEEN MORENO, JOHN GONZALEZ & DEBRA VELASQUEZ are petitioners.	NEEDS/PROBLEMS/COMMENTS:
	40 days since DOD.	
Cont. from	No other proceedings.	
<input type="checkbox"/> Aff.Sub.Wit.	Decedent died intestate.	
<input checked="" type="checkbox"/> Verified	I & A - \$125,000.00	
<input type="checkbox"/> Inventory	Petitioners request court determination that Decedent's 100% interest in real property located in Sanger pass to them in equal shares pursuant to intestate succession.	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail W/		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 4/25/16
		Updates:
		Recommendation: SUBMITTED
		File 22- Gonzalez

Spousal Property Petition

DOD: 9/28/2015		<p>SUSAN L. WAITE, surviving spouse, is petitioner</p> <p>No other proceedings</p> <p>Decedent died intestate</p> <p>Petitioner states decedent obtained real property in June 1997. Petitioner moved in with decedent the end of 2002 or early 2003 and they lived as husband and wife. Decedent and petitioner were married on 8/18/2011. Although real property was held in the name of decedent alone, petitioner and decedent lived together in the property and petitioner continues to live there. They paid all expenses related to the property from their community funds and both expended their community time and efforts in the maintenance of the property. From late 2002 or early 2003 until the present, petitioner has paid or shared in the payment of the mortgage, insurance, taxes, maintenance and household expenses. Petitioner has continued to pay the mortgage on the property since decedent's death. Decedent expressed on multiple occasions that the house was petitioner's and decedent's. Decedent had two children who are both adults and have acknowledged the property as the community property of decedent and petitioner.</p> <p>Petitioner requests court confirmation that 1/2 interest in real property at 5016 East Thomas Avenue, Fresno CA, belongs to her and that 1/2 interest passes to her.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Petitioner states decedent obtained real property prior to petitioner and decedent's marriage. Therefore, it appears at least a portion of the property the petitioner is trying to pass in this spousal property petition is decedent's separate property pursuant to Family Code 770(2). Therefore, pursuant to Probate Codes 13500, 13501(a) and 6401, it appears this property may not be subject to this type of proceeding.</p>	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input 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: SEF		
		Reviewed on: 4/26/2016		
		Updates:		
		Recommendation:		
		File 23- Waite		

Petitioner: Silvia Carillo Espinoza (Pro per – Maternal grandmother)

Petitioner: Jose Luis Martinez Maravilla (Pro per – Maternal step-grandfather)

Petition for Appointment of Temporary Guardian of the Person

		<u>GENERAL HEARING 6/16/16</u>	NEEDS/PROBLEMS/COMMENTS:		
		SILVIA CARILLO ESPINOZA and JOSE LUIS MARTINEZ MARAVILLA, maternal grandmother and maternal step-grandfather, are petitioners			
Cont. from		See petition for details.			
<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 type="checkbox"/>	Aff.Mail				
<input type="checkbox"/>	Aff.Pub.				
<input type="checkbox"/>	Sp.Ntc.				
<input checked="" type="checkbox"/>	Pers.Serv.			w/	
<input checked="" type="checkbox"/>	Conf. Screen				
<input checked="" type="checkbox"/>	Letters				
<input checked="" type="checkbox"/>	Duties/Supp				
<input type="checkbox"/>	Objections				
<input type="checkbox"/>	Video Receipt				
<input type="checkbox"/>	CI Report				
<input type="checkbox"/>	9202				
<input checked="" type="checkbox"/>	Order				
<input type="checkbox"/>	Aff. Posting				
<input type="checkbox"/>	Status Rpt				
<input checked="" type="checkbox"/>	UCCJEA				
<input type="checkbox"/>	Citation				
<input type="checkbox"/>	FTB Notice				
				Reviewed by: SEF	
				Reviewed on: 4/26/16	
			Updates:		
			Recommendation:		
			File 24- Pino		