



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.

Report of Sale and Petition for Order Confirming Sale of Real Property (Prob. C. 2540, 10308)

DOD: 11/15/2004	JOSE DELGADO is Administrator/petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: If the petition is granted, a status hearing will be set as follows:</p> <ul style="list-style-type: none"> Friday, May 31, 2013 at 9:00 a.m. in Department 303, for the filing of the receipt for blocked 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 checked="" type="checkbox"/> Reappraisal		
<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 checked="" 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: 4/23/13
Updates:
Recommendation:
File 1 – Delgado

Age: 19	BANK OF THE WEST , Trustee without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 11-1-10 through 12-31-12	<p>Note: The Court previously authorized funds up to \$60,000 the purchase of a new van with modifications for the beneficiary's benefit on 7-7-11; however, this petition states a new vehicle has not yet been purchased. The Court may require status on the current van and the proposed purchase, as this request was made over two years ago in January 2011.</p>
	Accounting: \$660,407.68	
	Beginning POH: \$402,144.39	
	Ending POH: \$420,233.74	
	(\$23,421.39 cash, residence, wheelchair, laptop, lien on van)	
Aff.Sub.Wit.	Trustee: \$250.00 for preparation of this account	
✓ Verified	Trustee: Ratification of compensation paid on a monthly basis during this account period totaling \$7,044.61 (.75% - less than fee schedule 1.30%) plus \$1,000.00 for preparation of income tax returns (less than fee schedule)	
Inventory	IBAR: Ratification of compensation paid on a monthly basis during this account period totaling \$7,043.02 (.75% market value excluding annuities)	
PTC	Attorney: \$16,588.00 (pursuant to separate fee declaration, for 80.60 hours @ \$75-375 hr)	
Not.Cred.	Costs: \$226.00 (certified copy, filing)	
✓ Notice of Hrg	Petitioner requests an order:	
✓ Aff.Mail w	1. Settling, allowing and approving the account and ratifying, confirming and approving all acts and transactions of Petitioner relating to the account;	
Aff.Pub.	2. Allowing compensation to Petitioner of \$250 for preparation of this account;	
Sp.Ntc.	3. Ratifying compensation paid to Petitioner of \$7,044.61 plus \$1,000.00 for preparation of income tax returns;	
Pers.Serv.	4. Ratifying compensation paid to IBAR of \$7,043.02;	
Conf. Screen	5. Authorizing continued payment to IBAR at the same rate as currently being charged;	
Letters	6. Authorizing payment to Dowling Aaron Incorporated for fees and costs totaling \$16,814.00;	
Duties/Supp	7. Allowing Hector Medina to continue to receive payments for attendant care with said aggregate cap to increase by 3% per annum;	
Objections	8. That no bond be required of Petitioner; and	
Video Receipt	9. For such other and further orders as this Court may deem proper.	
CI Report		
✓ 2620(c)		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 4-25-13
		Updates:
		Recommendation:
		File 2 – Lopez

Corrected First Account and Report of Guardian

Age: 13 years DOB: 9/16/1999	RHONDA L. (Mommer) SLATER, mother/guardian, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Receipts and Disbursements are rounded off to the nearest dollar. The receipts and disbursements should show what the actual amount of the receipt or disbursement and should not be rounded. 2. Order does not comply with Local Rule 7.6.1.C. All order settling accounts shall contain a statement as to the balance of the estate on hand, specifically noting the amount of cash included in the balance.
	Account period: 4/4/06 – 12/31/12	
Cont. from	Accounting - \$27,115.00	
Aff.Sub.Wit.	Beginning POH - \$51,989.00	
✓ Verified	Ending POH - \$51,989.00	
Inventory	Guardian - waives	
PTC	Attorney - not requested.	
Not.Cred.		
Notice of Hrg		
Aff.Mail	Petitioner requests that:	
Aff.Pub.	1. The Court make an Order approving, allowing, and settling the first account and report of guardian.	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 4/23/13
		Updates:
		Recommendation:
		File 3 - Mommer

Age: 82 years	<p>GARY BAGDASARIAN, petitioner was Court appointed to represent the Conservatee on 9/4/2012.</p> <p>By Order Approving Stipulation for Settlement filed on 1/4/2013 matters involving the financial affairs of the proposed conservatee were to be handled by the contesting parties without the creation of a conservatorship estate.</p> <p>Petitioner requests fees in connection with the representation of the Conservatee for Mark Owens and William Owens Jr.'s petition to appoint a conservator.</p> <p>Petitioner asks that he be paid from the conservatorship estate for 13.2 hours @ \$250.00 per hour for a total of \$3,300.00 and for costs of \$435.00.</p> <p>Services are itemized by date and include review of documents, visits with client, and court appearances.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
Cont. from			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail			W/
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: KT	
		Reviewed on: 4/24/13	
		Updates:	
		Recommendation:	
		File 4 – Owens	

Amended Waiver of Accounting, and Petition for Allowance of Statutory Fees to Attorney for Executor, and Petition for Final Distribution [Prob. C. 11600]

DOD: 04/10/12		MARIA G. RESENDES , Executor, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. The Petition does not address whether the notice required under Probate Code § 9202(b) to the Victims Compensation Board is needed</p>
		Accounting is waived.	
		I &A - \$178,280.53	
Cont. from		POH - \$178,280.53	
	Aff.Sub.Wit.	(\$38,280.53 is cash)	
✓	Verified		
✓	Inventory	Executor - waived	
✓	PTC		
✓	Not.Cred.	Attorney - \$6,348.41 (statutory)	
✓	Notice of Hrg		
✓	Aff.Mail	Distribution, pursuant to Decedent's will is to:	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	Maria G. Resendes - \$38,280.53 cash	
	Conf. Screen		
	Letters	Mariela Resendes - real property located at 2071 E. Minarets, Fresno, CA	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202	x	
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
✓	FTB Notice		
			Reviewed by: JF
			Reviewed on: 04/25/13
			Updates:
			Recommendation:
			File 5 – Fields

Petition for Attorneys Fees

Age: 40 years		<p>CATHERINE AMADOR, attorney for MANUEL SANCHEZ and SUSAN CHAVEZ, is petitioner.</p> <p>MANUEL SANCHEZ and SUSAN CHAVEZ were appointed Conservator of the Person and Estate on 10/26/12.</p> <p>Petitioner requests fees in connection with the representation of the Conservators for their petition to be appointed conservators.</p> <p>Petitioner asks that she be paid from the conservatorship estate for 26.1 hours @ \$265.00 per hour for a total of \$6,916.50 and for costs of \$540.00.</p> <p>Services are itemized by date and include preparation of documents, communications with client, and court appearances</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service of the Notice of Hearing on: <ol style="list-style-type: none"> a. Cynthia Carla Chavez (conservatee) b. Manuel Sanchez (conservator) c. Susan Chavez (conservator) <p>Note: The inventory and appraisal filed on 3/7/2013 includes anticipated EED disability payments. The inventory and appraisal should not include anticipated income. Income should be reported in the accounting.</p>
DOB: 1/26/1973			
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed by: KT	
		Reviewed on: 4/25/2013	
		Updates:	
		Recommendation:	
		File 6 -Chavez	

7 Auri Brooks, Tazon Brooks, Antwon Brooks, Jr., Sacari Brooks, and I'Fasih Armstrong (GUARD/P)

Case No. 12CEPR00949

Atty Boyett, Deborah K. (for Makiah Taneal Woods – Petitioner- Maternal Aunt)

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

I'Fasih, 16	TEMPORARY EXPIRES 01/02/13		NEEDS/PROBLEMS/COMMENTS:
Auri, 11	MAKIAH TANEAL WOODS , maternal aunt, is Petitioner.		<p>Minute Order of 01/02/2013: states both fathers object to the petition. Counsel is directed to assist Ms. Woods in arranging visitation between the children and Mr. Brooks. Visitation for Mr. Armstrong is not imposed at this time. Mr. Armstrong provides his contact information to the Court.</p> <p>1. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:</p> <ul style="list-style-type: none"> Ronald Armstrong (Father of I'Fasih) <p>Note: Notice of Hearing with proof of service by mail was served on an individual by the name of Ronnice "Ronnie" Armstrong on 12/07/2012. It is unclear to the examiner who this individual is.</p>
Tazon, 10	Father (I'Fasih): RONALD ARMSTRONG		
Antwon, 9	Father (all others): ANTWON BROOKS – personally served on 12/16/2012		
Sacari, 8	Mother: BLONDY DAVIS – Consents & Waives Notice		
Cont. from 010213, 030613	Paternal grandfather (I'Fasih): Ronald Armstrong – Served by mail on 12/20/12.		
Aff.Sub.Wit.	Paternal grandmother (I'Fasih): Rosemary Mayberry Armstrong Coreen Rich – served by mail on 12/20/12		
Verified	Paternal grandfather (all others): DECEASED		
Inventory	Paternal grandmother (all others): Naitalia Brooks		
PTC	Maternal grandfather: Charley Ricky Davis, Deceased		
Not.Cred.	Maternal grandmother: Gloria Mitchell		
✓ Notice of Hrg	Minor: I'Fasih Armstrong, served in person on 11/15/2012		
Aff.Mail	Petitioner alleges the children resided full time with their mother until she was remanded into custody and is now incarcerated. The mother has nominated Petitioner to be the guardian of her children. Petitioner states that neither father is involved with the children. I'Fasih's father has been absent from her life for 14+ years and the other children's father, Antwon Brooks has been violent with the mother. There is a pending dissolution of marriage between Mr. Brooks and the mother and he has not had contact with his children for more than a year.		
✓ Aff.Pub.			
Sp.Ntc.			
✓ Pers.Serv.	w/		
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
CI Report	x		
9202			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
Please see additional page			<p>Reviewed by: LV</p> <p>Reviewed on: 04/25/2013</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7 – Brooks & Armstrong</p>

Declaration of Blondy L. Davis (Mother) in Support of Petition for Appointment of Temporary Guardian of the Person filed 10/22/2012 states the father of I'Fasih, Ronald Ronnie Armstrong is a virtual stranger to the minor, at no time has there ever been a court order regarding custody or visitation as to I'Fasih.

Antwon Roman Brooks is the father of the remaining children. The mother and Antwon Brooks are married, a petition for dissolution of marriage was filed September 2011, however the two have lived separately since October 2010.

On or about May 11, 2011 Antwon Brooks used force to enter her home and removed the children. The mother, Blondy L. Davis, later found out that he had taken the children to Arizona or Nevada and had brandished weapons in their presence, including handguns and grenades. On May 17, 2011 Mr. Brooks returned the children to their school. Ms. Davis, the mother, was able to obtain a Temporary Restraining Order to prevent him from taking the children again. Antwon Brooks' whereabouts was unknown which prevented him from being served therefore the temporary restraining order expired.

Blondy L. Davis, the mother, states that Antwon Brooks has been abusive towards her in the past.

Objection of Ronald Armstrong (Father of I'Fasih Armstrong) filed 12/31/2012 states that he and the mother separated when their daughter was four years old. Since he no longer wanted a relationship with the mother, she did not allow visitation with the child. Now that the child is a teenager he wishes to have equal share with the child.

Court Investigator Jennifer Young's report filed 12/20/2012.

Declaration of Makiah Taneal Woods in Support of Request for Dismissal Without Prejudice of Petition for Appointment of Guardian of the Person filed 04/22/2013 states that the Mother, Blondy Davis, returned to her own home with the children, and there is no longer a need for guardianship. Petitioner requests that the Court dismiss without prejudice the Petition for Appointment of Guardian of the person and that the matter be taken off calendar.

Needs/Problems/Comments (continued from previous page)

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:
 - Ronald Armstrong (Paternal Grandfather of I'Fasih) served with 13 days notice and not the required 15 days.
 - Coleen Rich (Paternal Grandmother of I'Fasih) – served with 13 days notice and not the required 15 days.
 - Naltalia Brooks (Paternal Grandmother of the other children)
 - Gloria Mitchell (Maternal Grandmother)

Petition for Beneficiary to Appoint Successor Trustee Upon Vacancy; Accounting by Prior Trustee; Fixing Successor Trustee's Compensation for Payment of Attorney's Fees and Reimbursement of Costs Advanced (Prob. C. 15660(d), 17200(b)(7), 17200(b)(9), 16243, 16247)

Decedent: Carol Bailey DOD: 9-5-07	DAVID LILES and ARLENE LILES , in their capacity as Guardians of the Person of RAVEN NICOLE BAILEY , minor beneficiary, are "Petitioner."	NEEDS/PROBLEMS/COMMENTS: 1. A Guardian of the Person does not have authority to bring this petition on behalf of the minor. <i>Note: Petition for Appointment of Guardian Ad Litem – Probate (Ex Parte) (DE-35 /GC-100) and order thereon is currently pending with this Court.</i> 2. The Court may require clarification as to sufficiency of a \$50,000.00 bond. Petitioner does not provide any statement as to the value of the trust at this time. 3. Petitioner requests the Court order the successor or representative of deceased trustee David St. Louis to file an accounting with the Court for the period that he served as trustee. The Court may require authority for this request and clarification as to the specific person or attorney the request and order are directed to. <u>Upon clarification, additional notice or citation may be required.</u>
Minor Beneficiary: Raven (age 15)	Petitioner states: Minor RAVEN NICOLE BAILEY is the sole remaining beneficiary of income and principal of the Trust. BRANDON MICHAEL BAILEY is also a named beneficiary of the Trust; however, Petitioner is informed and believes that his interest has already been completely distributed. Petitioners David Liles and Arlene Liles were contingent beneficiaries if neither Raven nor Brandon survived Decedent. There are no other beneficiaries except for Raven.	
<input type="checkbox"/> Aff.Sub.Wit.	DAVID J. ST. LOUIS recently served as successor trustee from 9-18-07 until his death on 10-7-12. The office of trustee is now vacant, and the Trust does not have an "acting" trustee with power to designate a successor.	
<input checked="" type="checkbox"/> Verified	Petitioner believes appointment of ALLISON ST. LOUIS , daughter of David St. Louis, is in the best interest of the beneficiary because she has specific knowledge of the history, facts and circumstances surrounding administration of the Trust from working in the office of David St. Louis and has participated in the administration of the Trust as part of the office,. She also has specific knowledge of the history, facts and circumstances of the beneficiary and has a positive relationship with her. Ms. St. Louis consents to serve and provided a declaration in support of this petition.	
<input type="checkbox"/> Inventory	Petitioner requests that Ms. St. Louis be appointed with bond of \$50,000.00 subject to Court discretion to increase or decrease as appropriate. Petitioner believes Ms. St. Louis' fees for administration of the Trust would be less than a corporate trustee or trust company and Petitioner requests the Court fix such fees at the schedule herein (starting at the greater of 2.0% on the first \$200,000.00 per year, or hourly \$150/hour).	
<input type="checkbox"/> PTC	Petitioner states the trust is silent as to whether accounting is required. Probate Code § 16062 requires accounting at least annually or on change of trustee. Petitioners therefore request that the Court order the successor or representative of DAVID ST. LOUIS, deceased, to file an accounting with the Court detailing his acts as Trustee from 9-18-07 until his date of death 10-7-12.	
<input type="checkbox"/> Not.Cred.	SEE ADDITIONAL	
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail (w/o)		
<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: skc
		Reviewed on: 4-26-13
		Updates:
		Recommendation:
		File 8 – Bailey

Page 2

Petitioner states The Law Office of Gary L. Winter, Inc., has rendered valuable services to the Trust and attorney's fees should be allowed in the amount of \$3,873.50, as itemized on Exhibit G, plus costs in the amount of \$508.20 for costs.

Petitioner requests:

1. The Court appoint **ALLISON ST. LOUIS** as Successor Trustee with bond of \$50,000.00.
2. The Court approve the proposed fee schedule;
3. The Court order the successor or representative of the prior trustee **DAVID J. ST. LOUIS**, deceased, to file an accounting with the Court detailing his acts as trustee, and direct that the accounting be filed no later than four weeks after the Court makes its order.
4. The Court order attorney's fees and costs to be paid from the trust within 10 days of the order;

Declaration of Allison St. Louis in Support of Petition states she is familiar with the Trust because she served in the office of David J. St. Louis while he was trustee and managed this matter for him as part of her duties as legal secretary. She is familiar with David and Arlene Liles, and knows and is familiar with Raven and has a positive relationship with her. Ms. St. Louis states she has worked in the law office of David J. St. Louis since 1986 full time, part time, and on special projects, most recently, full time since 2009. She previously worked for a credit union as administrative assistant to CFO, and is experienced in civil litigation, personal injury, wills, trusts, and estates. Ms. St. Louis states she is not an attorney, but was integrally involved in the delivery of legal services and understands maintaining confidential information, fiduciary obligations, trust accounting, and related matters. Ms. St. Louis states she has not served in capacity as trustee before; however, she believes she is qualified to do so because of her years of experience working in a law office, maintaining confidences, handling trust accounting, and assisting with trust administration, estates, and related matters. She has no history of financial infidelity, criminal charge or prosecution for fraud, embezzlement or financial crime. She is not in a financially desperate situation and is able to provide for herself and her family without acting as successor trustee. She has been bonded before when she worked as a financial services officer with Bank of the West from 1987-1989 and believes she will be able to obtain bond in the amount of \$50,000.00.

Atty Garza, Maria Magdalena (Pro Per – Petitioner – Guardian)

Petition for Termination of Guardianship

Jorge Age: 15	<p>MARIA MAGDALENA GARZA, paternal grandmother, is petitioner. Maria Magdalena Garza was appointed guardian on 12/07/2006.</p> <p>Father: JORGE LUIS GARZA, served by mail on 04/02/2013</p> <p>Mother: LUZ MARIA ROSALES</p> <p>Paternal Grandfather: Juan Garza, Sr.</p> <p>Maternal Grandparents: Deceased</p> <p>Minor: Julian Garza, consents and waives notice.</p> <p>Petitioner states: Julian Juan Garza, minor, is not respectful and causes the others to do the same. He has been suspended from school for marijuana use and he refuses to go to school. The two older children come and go as they please, the younger children scream and cry because they want to do the same as the older siblings. Petitioner states she is not able to control the children and is in poor health. The petitioner states that the eldest child threw her against the wall after she caught him smoking marijuana in the house.</p> <p>Court Investigator Julie Negrete's report filed 04/15/2013.</p>		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Termination of Guardianship or declaration of due diligence for:</p> <ul style="list-style-type: none"> • Luz Maria Rosales (Mother) • Juan S. Garza, Sr. (Paternal Grandfather) • Jorge Luis Rosales (Minor) • Burgandy Marie Garza (Minor) 	
Julian Age: 14				
Burgandy Age: 12				
Claudia Age: 11				
Violet 10				
Aff.Sub.Wit.				
✓ Verified				
Inventory				
PTC				
Not.Cred.				
✓ Notice of Hrg				
✓ Aff.Mail	w/			
Aff.Pub.				
Sp.Ntc.				
Pers.Serv.				
Conf. Screen				
Letters				
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Objections				
Video Receipt				
✓ CI Report				
9202				
✓ Order				
Aff. Posting				
Status Rpt				
UCCJEA				
Citation				
FTB Notice				
		Reviewed by: LV		
		Reviewed on: 04/25/2013		
		Updates:		
		Recommendation:		
		File 10 – Rosales & Garza		