

Age: 40	<u>NO TEMPORARY REQUESTED</u>		NEEDS/PROBLEMS/COMMENTS:
	<p>STANLEY RUDD and SUZANNE RUDD, parents, and co-limited conservators of the Person, are Petitioners, and request appointment as co-conservators of the Estate with bond fixed at \$122,100.00. Petitioners request the power under Probate Code § 1830(b) to take possession of a lump sum benefit in the amount of \$111,000.00 and manage it for the benefit of the conservatee.</p>		<p>Court Investigator advised rights on 04/11/14.</p> <p>Voting rights affected, need minute order.</p> <p>Note: Other co-limited conservators, Jacqueline Bjerrum and Cozette Gaham, agree with the appointment of Petitioners as co-conservators of the estate.</p> <p>CVRC case manager Leah Chase filed a report that supports the Petition.</p> <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Thursday, 06/26/14 at 9:00a.m. in Dept. 303 for the filing bond and • Thursday, 06/25/15 at 9:00a.m. in Dept. 303 for the filing of the first account. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter, the status hearing will come off calendar and no appearance will be required.</p>
Cont. from	<p>Estimated Value of the Estate: Personal property - \$111,000.00 Recovery per CRC §7.207 - 11,100.00 Total Bond required - \$122,100.00</p>		
<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>Voting rights affected.</p> <p>Petitioners state that the conservatee is diagnosed with moderate mental retardation, cerebral palsy and a seizure disorder. He is unable to verbally communicate. He has never handled money and has a limited understanding of what money is. Conservatorship of the estate is needed to protect the conservatee from fraud or undue influence.</p> <p>Court Investigator Jennifer Young filed a report on 04/25/14.</p>		<p>Reviewed by: JF</p> <p>Reviewed on: 04/28/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1 – Rudd</p>

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

DOD: 10/2/2006		<p>JOAN GOUVEIA, daughter, is petitioner and requests appointment as Administrator with Will Annexed and without bond.</p> <p>Petitioner is the sole heir and waives bond.</p> <p>Full IAEA – ?????</p> <p>Will dated 9/1/1955</p> <p>Residence: Fresno Publication: Need</p> <p>Estimated value of the estate: Annual Income- \$ 1,200.00 Real property- \$350,000.00 Total - \$351,200.00</p> <p>Probate Examiner: Rick Smith</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> #5a(3) or 5a(4) of the petition was not answered re: registered domestic partner. Need Affidavit of Publication. Need Order Need Letters <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Wednesday, October 1, 2014 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Wednesday, June 30, 2015 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. <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 checked="" type="checkbox"/>	Proof of Hographic Inst,		
<input checked="" type="checkbox"/>	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail W/A		
	Aff.Pub. X		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters X		
<input checked="" type="checkbox"/>	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order X		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed by: KT	
		Reviewed on: 4/28/14	
		Updates:	
		Recommendation:	
		File 2 – Gouveia	

Atty **Gin, Robert W. (for David Washington – Son – Petitioner)**

Atty **Boyett, Deborah (Court appointed counsel for Proposed Conservatee)**

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

		TEMP EXTENDED TO 4-30-14	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p><u>Continued from 3-26-14</u></p> <p><u>Court Investigator advised rights on 1-10-14</u></p> <p>Voting rights affected – need minute order.</p> <p><u>Note:</u> New issues are noted. Please see Page 2.</p> <p style="text-align: center;"><u>SEE PAGE 2</u></p> <p><u>Note:</u> If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> • Thurs 6-19-14 for filing increased bond • Thurs 10-2-14 for filing I&A • Thurs 10-1-15 for filing first account <p>If the above items are on file prior to the hearing date pursuant to local rule, the hearing may come off calendar.</p>
		DAVID WASHINGTON , Son, is Petitioner and requests appointment as Conservator of the Person with medical consent and dementia powers and as Conservator of the Estate with powers pursuant to Probate Code §2590 with bond of \$11,000.00, and with the express authority to apply for veterans benefits.	
Cont. from 032614		Voting rights affected	
	Aff.Sub.Wit.	Two Capacity Declarations are filed.	
✓	Verified	Estimated Value of Estate:	
	Inventory	Personal property: \$10,000.00	
	PTC	Annual income: Unknown	
	Not.Cred.	Petitioner states the Proposed Conservatee has suffered a series of strokes and is unable to comprehend. She has been diagnosed with dementia and is unable to understand and make medical and financial decisions. She no longer recognizes her children. The Proposed Conservatee's spouse recently died and she will inherit real property and cash from his estate. A conservator is necessary to manage her assets. She does not like leaving her residence, but does not have a sense of personal safety and will wander into traffic if unsupervised.	
✓	Notice of Hrg	Court Investigator Dina Calvillo filed a report on 1-17-14.	
✓	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: skc	
		Reviewed on: 4-28-14	
		Updates:	
		Recommendation:	
		File 3 – Baker	

NEEDS/PROBLEMS/COMMENTS:1. **As previously noted: Need estimate of annual income for bond purposes.**

Note: Current bond filed is \$11,000.00, based on personal property estimate only. It appears based on the recent declaration that the \$11,000.00 is actually based on the conservatee's Social Security income. However, according to the Court Investigator's report, income sources include a 20% share of income from her late husband's estate as well as her Social Security and a VA pension (amount not specified). Pursuant to Cal. Rules of Court 7.204, the Conservatee has a duty to request increased bond immediately upon facts making such increase necessary. See also Probate Code §2320 and Cal. Rules of Court 7.207.

Note: Petitioner states he has filed a creditor's claim in the Estate of David Lee Baker 13CEPR00999 (the conservatee's spouse) in the amount of \$18,631.79 for an amount that Petitioner states was withdrawn by the decedent from an account owned by the Conservatee.

In addition, Petitioner states the Conservatee is currently receiving \$3,000.00/month from the estate to care for her needs. These funds are provided voluntarily by the executor of the estate and Petitioner states he is informed that the payments could end at any time. However, the payments will definitely end when the estate closes, if not before. It will likely close by the end of the year.

Based on the foregoing, the income is estimated at \$3,738.00/month, including the current social security income and the income from the estate. If the estate returns the conservatee's funds pursuant to the creditor's claim, the conservatee's personal property will be valued at \$30,719.44.

Therefore, Petitioner states bond of \$65,000.00 would be appropriate to protect the conservatee's estate. Petitioner has posted \$11,000 bond and will seek to have the amount raised to \$65,000 prior to the hearing.

Examiner's Note: Petitioner has not provided the estimated amount of benefits expected from the VA. The Court may require further clarification. See also information regarding the anticipated inheritance from her late husband's estate below.

Note: As previously noted above, pursuant to Cal. Rules of Court 7.204, the conservator of the estate, and the attorney, have a duty to increase bond upon new information. Petitioner does not state how long he has been receiving \$3,000/month on the conservatee's behalf; however, it appears this information should have been brought to the court's attention immediately ex parte and bond increased. The Court may require clarification as to the delay. Petitioner has been the temporary conservator for approx. four (4) months, since 12-20-13.

Info re Estate of David Lee Baker for reference:

- On 11-21-13, Ernest L. Baker, the decedent's brother and a resident of Oklahoma, was appointed as Special Administrator of the Decedent's estate with bond of \$935,000.00. Bond was filed and Letters issued on 12-4-13. Mr. Baker was later appointed as Executor of the decedent's will and Letters Testamentary issued on 1-10-14. Mr. Baker is represented by Attorney Eliot S. Nahigian.
- It appears that the Conservatee will receive the family home, income from the decedent's social security and veteran's benefits, and will ultimately receive 1/5 of the estate, approx. value \$332,000.
- **Examiner's Note:** Filing a creditor's claim in the decedent's estate may not be an appropriate vehicle for recovery of funds allegedly taken by the decedent during his lifetime. Does the petitioner plan to pursue recovery via civil action? If so, noticed petition and authorization may be required pursuant to applicable law.

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

Age: 99 years DOB: ???	TEMPORARY EXPIRES 4/30/14	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator Advised Rights on 04/11/2014</p> <p>Voting Rights Affected Need Minute Order</p> <p>1. Need Dementia Attachment, Judicial Council form GC-313.</p> <p>Note: The Capacity Declaration was attached to the Temporary Petition. This is a confidential document that should have be filed separately. The court may consider ordering the document removed from the temporary petition and filed confidentially.</p> <p>Note: Minute Order dated 03/27/2014 required bond set at \$45,000.00. Bond filed on 04/28/2014.</p>
	<p>LINDA CROUCH, daughter, is petitioner and requests appointment as conservator of the person, with medical consent, and dementia powers and for appointment as conservator of the estate without bond. (Minute Order 03/27/2014 required bond set at \$45,000.00)</p>	
Cont. from	<p>Estimated value of the estate:</p> <p>Personal property - \$25,000.00 Annual income - \$15,420.00 Total - \$40,420.00</p>	
<input type="checkbox"/> Aff.Sub.Wit.	Declaration of Haider Chaudhry.	
<input checked="" type="checkbox"/> Verified	Voting Rights Affected	
<input type="checkbox"/> Inventory	Petitioner states the proposed conservatee has a diagnosis of advanced dementia and Alzheimer's. She is unable to feed herself, dress herself, bathe herself, administer her own medications, to live alone or handle daily activities. She requires around the clock care. The proposed conservatee resides in the petitioner's home and her care is provided by the petitioner.	
<input type="checkbox"/> PTC	Court Investigator, JoAnn Morris's report filed on 04/22/2014.	
<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 checked="" type="checkbox"/> Pers.Serv.		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input checked="" type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LV
		Reviewed on: 04/28/2014
		Updates: 04/29/2014
		Recommendation:
		File 4 – Welton

DOD: 08/06/2013	SARAH MEDINA CAMPBELL , daughter is petitioner and requests appointment as Administrator without bond.	NEEDS/PROBLEMS/COMMENTS: All heirs waive bond Full IAEA – o.k. Decedent died intestate Residence: Fresno Publication: The Business Journal Estimated value of the Estate: Real Property - \$150,000.00 Probate Referee: Rick Smith Note: If the petition is granted status hearings will be set as follows: <ul style="list-style-type: none"> • Wednesday, 10/01/2014 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Wednesday, 07/01/2015 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
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 checked="" type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LV
		Reviewed on: 04/28/2014
		Updates:
		Recommendation: Submitted
		File 5 – Medina

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 12/24/2013	MELVIN BISGAARD , father is petitioner and requests appointment as Administrator without bond.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. #5a(2) of the petition is marked as to no spouse however #5a(2) (a) or (b) is not marked regarding decedent was divorced or never married or spouse is deceased.</p> <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Wednesday, 10/01/2014 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Wednesday, 07/01/2015 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
	All heirs waive bond	
	Full IAEA – o.k.	
Cont. from	Decedent died intestate	
<input type="checkbox"/> Aff.Sub.Wit.	Residence: Fresno	
<input checked="" type="checkbox"/> Verified	Publication: The Business Journal	
<input type="checkbox"/> Inventory	Estimated value of the Estate:	
<input type="checkbox"/> PTC	Real Property - \$155,000.00	
<input type="checkbox"/> Not.Cred.	Less encumbrances (-\$127,000.00)	
<input checked="" type="checkbox"/> Notice of Hrg	Total - \$28,000.00	
<input checked="" type="checkbox"/> Aff.Mail	Probate Referee: Steven Diebert	
<input checked="" type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed on: 04/28/2014
		Updates:
		Recommendation:
		File 6 –Bisgaard

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

DOD: 10/1/2013		<p>BRENT EDWARD HUDNALL, son, is petitioner and request appointment as Administrator with Will Annexed.</p> <p>Bond is not addressed.</p> <p>Limited IAEA – o.k.</p> <p>Will dated: 9/15/1986</p> <p>Residence: Fresno Publication: Fresno Business Journal</p> <p>Estimated value of the estate:</p> <table> <tr> <td>Personal property</td> <td>-</td> <td>\$ 55,000.00</td> </tr> <tr> <td>Real property</td> <td>-</td> <td>\$150,000.00</td> </tr> <tr> <td>Total</td> <td>-</td> <td>\$205,000.00</td> </tr> </table> <p>Probate Referee: Rick Smith</p>	Personal property	-	\$ 55,000.00	Real property	-	\$150,000.00	Total	-	\$205,000.00	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Petition does not address bond. Bond should be set at \$55,000.00 or need waivers of bond from all heirs. #3g(2) of the petition is incomplete. It indicates the personal representative in a nonresident of California but does not include petitioner's permanent address. <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Wednesday, June 4, 2014 at 9:00 a.m. in Department 303, for the filing of the bond, if required. Wednesday, October 1, 2014 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Wednesday, June 30, 2015 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. <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>
Personal property	-		\$ 55,000.00									
Real property	-		\$150,000.00									
Total	-		\$205,000.00									
Cont. from												
<input type="checkbox"/> Aff.Sub.Wit.	S/P											
<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 checked="" type="checkbox"/> Letters												
<input checked="" type="checkbox"/> Duties/Supp												
<input type="checkbox"/> Objections												
<input type="checkbox"/> Video Receipt												
<input type="checkbox"/> CI Report												
<input type="checkbox"/> 9202												
<input checked="" type="checkbox"/> Order												
<input type="checkbox"/> Aff. Posting												
<input type="checkbox"/> Status Rpt												
<input type="checkbox"/> UCCJEA												
<input type="checkbox"/> Citation												
<input type="checkbox"/> FTB Notice												
		<p>Reviewed by: KT</p> <p>Reviewed on: 4/28/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7 – Kirby</p>										

DOD: 5/25/2013	BAXTER K. RICHARSON and STEPHANIE D. RICHARDSON are petitioners.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. It appears that the original will has not been deposited as required by Probate Code §8200. 2. Jess Bippus, named alternate executor, is not listed on #14 as required. 3. Myrna Bippus and Andee Welch devisees were not listed on #14. 4. Need proof of service of the Notice of Hearing on Myrna Bippus and Andee Welch pursuant to Probate Code §13153.
	40 days since DOD.	
	No other proceedings.	
Cont. from	Will dated 9/29/1994 – devises the residue to petitioners.	
Aff.Sub.Wit.	I & A - \$60,000.00	
✓ Verified	Petitioners request Court confirmation that Decedent's 100% interest in real property located at 1242 E. Alhambra in Fresno pass to them pursuant to Decedent's will.	
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: 4/28/14
		Updates:
		Recommendation:
		File 8 – Welch

Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 9/25/11		CAROLE L. MITCHELL is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>5. It appears that the original will dated 4/23/1983 has not been deposited as required by Probate Code §8200. <u>Note:</u> A will dated 6/13/1980 was deposited.</p> <p>6. Need property tax certificate.</p>
		40 days since DOD.	
		No other proceedings.	
Cont. from		Will dated: 4/23/1983 devises the entire estate into a testamentary trust.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory	I & A - \$71,539.50	
<input type="checkbox"/>	PTC	X	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Petitioner requests Court determination that decedent's various interests in several parcels of real property located in Kings County pass to her as Trustee of the John K. Mitchell Testamentary Trust.	
<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: 4/29/14
			Updates:
			Recommendation:
			File 9 – Mitchell

DOD: 07/06/12		<p>AVON SHAKESPEARE, surviving spouse, is Petitioner.</p> <p>No other proceedings.</p> <p>Decedent died intestate.</p> <p>Petitioner states that he and the decedent were married on 04/28/2001. At the time of their marriage, Decedent owned real property that he sold, the proceeds of that sale were used to purchase real property at 1550 Kamm Avenue #101 in Kingsburg. All property taxes, insurance premiums, payments and maintenance expenses for the property were paid with community funds of Petitioner and decedent.</p> <p>Petitioner requests court confirmation that ½ interest in real property located at 1550 Kamm, No. 101, Kingsburg, CA belongs to him and ½ interest passes to him.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</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		
		<p>Reviewed by: JF</p> <p>Reviewed on: 04/28/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 10 – Shakespeare</p>	

Status Hearing Re: Filing of the Petition for Final Distribution

DOD: 02/24/2012	<p>KENNETH ROBERTS, was appointed Administrator with full IAEA and with bond set at \$20,000.00 on 10/18/2012.</p>	NEEDS/PROBLEMS/COMMENTS:
Cont. from 122013, 010214, 031314	<p>Proof of Bond was filed 2/22/2013 showing bond posted in the sum of \$20,000.00.</p>	
Aff.Sub.Wit.	<p>Letters issued on 03/14/2013.</p>	
Verified		
Inventory	<p>Final Inventory and Appraisal filed on 10/15/2013 shows an estate valued at \$129,764.97.</p>	
PTC		
Not.Cred.		
Notice of Hrg	<p>Minute Order of 10/18/2012 set this matter for hearing on 12/20/2013 for status of filing for final distribution.</p>	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.	<p>Minute Order dated 12/20/2013 [Judge Snauffer] states: No appearances. Matter continued to 1/2/2014. The Court orders Larry Donaldson to be personally present on <u>1/2/2014</u>.</p>	
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
✓ Status Rpt		
UCCJEA		
Citation		
FTB Notice		

1. Need First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.

Reviewed by: LV
Reviewed on: 04/29/2014
Updates:
Recommendation:
File 11 – Roberts

Status Hearing Re: Status Report on Receipt of Assets into the Special Needs Trust; and/or Filing of Receipt for Blocked Account; and/or Filing of the First Account of the Special Needs Trust

Cont. from 122013, 012414, 021414, 040414		
<input type="checkbox"/> Aff.Sub.Wit.		
<input type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report 9202		
<input type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		

The Order establishing the **JENNIFER ROBERTS SPECIAL NEEDS TRUST** was filed 11/05/12 after a hearing on 10/31/13 in which the Court approved the establishment of the Trust. The Order specified that **CHRISTINA ROBERTS**, guardian of the minor, Jennifer Roberts, was appointed as the initial Trustee of the Trust and that all proceeds of the Trust were to be deposited into a blocked account.

Minute Order from 10/31/12 set this matter for hearing on 12/20/13 regarding the receipt of funds into blocked account and/or filing of the first account. The minute order specified that the Trust estate is waiting on the outcome of the probate administration of the estate of Michael Roberts (Jennifer's father) of which Jennifer is a beneficiary and any proceeds from the estate are to be deposited into the Special Needs Trust.

Receipt and Acknowledgment of Order for the Deposit of Money into Blocked Account filed 01/28/13.

Inventory & Appraisal, partial no. 1 filed 02/14/13 - \$235,837.56

NEEDS/PROBLEMS/COMMENTS:

CONTINUED FROM 04/04/14

1. Need status update regarding additional funds to be received/deposited into the Trust.
2. Need First Account.
3. Need Final Inventory & Appraisal.

Reviewed by: JF

Reviewed on: 04/28/14

Updates:

Recommendation:

File 12 – Roberts

DOD: 05/22/13		<p>TERRI JEAN, spouse, was appointed as Administrator with limited IAEA and bond in the amount of \$64,400.00 on 10/30/13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 04/04/14</u></p> <p>1. Need Final Inventory & Appraisal.</p>
<p>Cont. from 040414</p>			
Aff.Sub.Wit.		<p>Bond was filed 11/12/13 and Letters of Administration were issued on 11/20/13.</p>	
Verified			
Inventory		<p>Inventory & Appraisal, Partial No. 1 filed 03/12/14 - \$486,277.83</p>	
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: JF
			Reviewed on: 04/28/14
			Updates:
			Recommendation:
			File 13 - Jean

DOD: 06/30/2011	RICARDO GARCIA, brother was appointed Administrator.	NEEDS/PROBLEMS/COMMENTS:
	Minute Order of 03/19/2014 set this matter for hearing.	
Cont. from	Minute Order of 03/19/2014 states Counsel is directed to obtain the necessary bond waivers or a bond in the amount of \$10,000.00. The petition is granted.	1. Need \$10,000.00 bond or waivers of bond. Note: A Disclaimer of Interest by Rosa Sapien, Harvey Blanco, Rosendo Garcia and Jackeline Blanco state that they also disclaim all of the rights of her minor children to the decedent's estate. A disclaimer cannot be made by a parent on behalf of a minor child unless they have been appointed as guardian of the state or guardian ad litem after a noticed hearing pursuant to Probate Code§ 277. Note: Pursuant to Intestate Succession the beneficiaries of the decedent's estate would be the parents, Hortencia Miranda and Modesto Blanco. Hortencia Miranda and Modesto Blanco have disclaimed their interest. If a beneficiary disclaims their interest in the estate, the disclaimer acts as if the disclaiming party pre-deceased the decedent. See Probate Code §275 et seq. for disclaimers. A Disclaimer when effective is irrevocable pursuant to Probate Code §281. <u>Continued on additional page</u>
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: 04/28/2014
		Updates:
		Recommendation:
		File 14 – Blanco

14 (additional page) James Blanco (Estate) Case No. 13CEPR01102

Since Modesto Blanco (father) and Hortencia Miranda (mother) and all decedent's siblings except petitioner, Ricardo Garcia (issue of Hortencia and Modesto) disclaimed, the issue of decedent's siblings are now the intestate heirs of the Estate. The issue of the disclaiming siblings are as follows and would then be the intestate heirs along with Ricardo:

- Ashley Sapien - 18
- Mariah Sapien - 16
- Vanessa Sapien - 5
- Angel Blanco - 10
- Laurissa Barajas - 8
- April Clark - 17
- Suzie Clark - 13
- Harvey Isaac Blanco - 13
- Isaac Harvey Blanco - 13
- Samuel Blanco - 7
- Rosendo Garcia, Jr. - 8

Note: Order is in the file for the Court's signature once the appropriate documents have been filed.

		MICHELLE SULLIVAN , mother/Guardian of the Estate, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of service at least 15 days before the hearing of <i>Notice of Hearing</i> <u>or</u> Declaration of Due Diligence <u>or</u> Consent & Waiver of Notice for: <ol style="list-style-type: none"> a. Destiny Sullivan (ward) b. Grandparents c. Siblings 12 and over
		Petitioner states that Destiny has turned 18 and requests to withdraw the balance of funds held in a blocked account.	
Cont. from		Account balance - \$23,276.85	
<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 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.		
<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		
		Order on Ex Parte Petition filed 04/10/14, set this matter for a noticed hearing on 04/30/14. Clerk's Certificate of Mailing filed 04/10/14 states that the Order on Ex Parte Petition dated 04/10/14 was mailed to Petitioner, Michelle Sullivan.	
		The Order on Ex Parte Petition filed 04/10/14 further indicated that there is no record that a final accounting has been filed and the guardian has not been released pursuant to Probate Code § 2627. Further, the order stated that Notice of this hearing on the Petition for Withdrawal of Funds from Blocked Account was to be served on all interested parties, including Destiny Sullivan at least 15 days before the hearing.	
		Reviewed by: JF	
		Reviewed on: 04/28/14	
		Updates:	
		Recommendation:	
		File 15 – Sullivan	

16 Carribbean Thomas, Camora Foster, Craig Foster, Jr. (GUARD/P)
Case No. 10CEPR01078

Atty Thomas, Shacola (pro per – maternal aunt/guardian of Craig Foster)
 Atty Pennington, Gloria (pro per – maternal great-grandmother/guardian of Carribbean & Camora)
 Atty Thomas, Patricia (pro per – mother/Petitioner)

Petition for Termination of Guardianship

Carribbean, 15	PATRICIA THOMAS , mother, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need <i>Notice of Hearing</i> . 2. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Termination of Guardianship</i> or <i>Consent & Waiver of Notice</i> or <i>Declaration of Due Diligence</i> for: a. Shacola Thomas (guardian of Craig) b. Craig Foster, Sr. (father) c. Paternal grandparents d. Marcus Thomas (maternal grandfather) e. Allene Turner (maternal grandmother)
Camora, 6	GLORIA PENNINGTON , maternal great-grandmother, was appointed guardian of Carribbean and Camora on 05/16/11.	
Craig, 5	SHACOLA THOMAS , maternal aunt, was appointed guardian of Craig on 06/27/11.	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.	Father: CRAIG FOSTER, SR.	
<input checked="" type="checkbox"/> Verified	Paternal grandparents: UNKNOWN	
<input type="checkbox"/> Inventory	Maternal grandfather: MARCUS THOMAS	
<input type="checkbox"/> PTC	Maternal grandmother: ALLENE TURNER	
<input type="checkbox"/> Not.Cred.	Petitioner states – (Petitioner's reasons for terminating the guardianship are unclear in the Petition.)	
<input type="checkbox"/> Notice of Hrg	Court Investigator Dina Calvillo filed a report on 04/22/14.	
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input 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 type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 04/28/14
		Updates:
		Recommendation:
		File 16 – Thomas & Foster

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

Age: 30	<u>NO TEMPORARY REQUESTED</u>		NEEDS/PROBLEMS/COMMENTS:
	<p>TRINIDAD CHAVEZ MOTA, mother, is Petitioner and requests appointment as Conservator of the Person with medical consent powers.</p>		<p>Continued from 03/05/2014: No appearances. Court directs Examiner notes be sent to Trinidad Mota.</p>
Cont. from 012914, 030514	<p>Declaration of Christopher Nevantzinis, M.D.</p>		<p>Copy of Minute Order and Examiner Notes mailed to Trinidad Mota on 03/06/2014.</p>
Aff.Sub.Wit.	<p>Voting Rights Affected</p>		<p>Court Investigator Advised Rights on 01/15/2014.</p>
✓ Verified	<p>Petitioner states: Conservatee is severely disabled, he cannot walk or talk and needs daily care for all his daily routine. Petitioner currently provides a stable home providing for his emotional and daily needs.</p>		<p>Voting Rights Affected Need Minute Order.</p>
Inventory	<p>Court Investigator JoAnn Morris' report filed on 01/17/2014.</p>		<p>The following issues remain:</p>
PTC			<p>1. Medical consent powers are not requested at #1g of the Petition but are requested at #9, therefore it is unclear if medical consent is requested.</p>
Not.Cred.			<p>2. Dr. Nevantzinis did not initial the Capacity Declaration at #7b as required.</p>
✓ Notice of Hrg			<p>3. #4a of the Capacity Declaration not answered as to when Dr. Nevantzinis last saw the proposed conservatee and #4b if the proposed conservatee is under continuing treatment.</p>
✓ Aff.Mail w/			<p>4. Need proof of service at least (30) days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Conservator for:</p> <ul style="list-style-type: none"> • Central Valley Regional Center per Probate Code §1822(e).
Aff.Pub.			
Sp.Ntc.			
✓ Pers.Serv. w/			
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
✓ Video Receipt			
✓ CI Report			
9202			
✓ Order			
Aff. Posting			Reviewed by: LV
Status Rpt			Reviewed on: 04/28/2014
UCCJEA			Updates:
✓ Citation			Recommendation:
FTB Notice			File 17 – Llamas

18 Olivia M. Garcia (CONS/PE)
Atty Brownson, Maria Begonia (pro per – daughter/Petitioner)
Atty LeVan, Nancy J. (Court Appointed for proposed conservatee)

Case No. 14CEPR00275

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

Age: 81		<u>NO TEMPORARY IN PLACE</u>		<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Court Investigator advised rights on 04/04/14.</p> <p>Voting rights affected, need minute order.</p> <ol style="list-style-type: none"> 1. Need receipt for viewing Conservatorship video. 2. If Petitioner is appointed as Conservator of the Estate, bond should be set in the amount of \$28,600.00 pursuant to CRC § 7.207 and Probate Code § 2320(c)(4).
		<p>MARIA BEGONIA BROWNSON, daughter, is Petitioner and requests appointment as Conservator of the Person with medical consent and dementia powers and as Conservator of the Estate without bond.</p>		
Cont. from		<p>Estimated Value of the Estate:</p>		
	Aff.Sub.Wit.		Personal property - \$ 8,400.00	
✓	Verified		Real property - 444,305.00	
	Inventory		Annual income - 18,000.00	
	PTC		Total - \$470,705.00	
	Not.Cred.		Voting rights affected.	
✓	Notice of Hrg		<p>Petitioner alleges that the proposed conservatee suffered a stroke about 10 years ago that resulted in diminished cognitive functioning. She is now suffering from dementia/alzheimer's and needs constant supervision and assistance. Last year, Petitioner moved the proposed conservatee from her home in San Jose to live with Petitioner in Sanger. Prior to living with Petitioner, the proposed conservatee was being cared for by one of her sons in her home in San Jose. Unfortunately, that son died from a heart attack leaving the proposed conservatee without a care-taker. Petitioner alleges that the girlfriend of the proposed conservatee's deceased son as well as an estranged son of the proposed conservatee have taken items of value from the proposed conservatees home in San Jose and are driving a vehicle that was purchased with the proposed conservatee's money for transporting the proposed conservatee. Petitioner seeks approval to rent out the proposed conservatee's home in San Jose and use the rental income for the conservatee's support. The proposed conservatee owns a residence and two parcels of land in San Jose. Petitioner requests appointment without bond, stating that she cannot afford a bond. In the alternative, Petitioner requests authority to use the proposed conservatee's income to purchase the bond.</p>	
✓	Aff.Mail	w/		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	w/		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt	x		
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
		<p>Court Investigator Julie Negrete filed a report on 04/23/14.</p>		
		<p>Reviewed by: JF</p>		
		<p>Reviewed on: 04/28/14</p>		
		<p>Updates:</p>		
		<p>Recommendation:</p>		
		<p>File 18 – Garcia</p>		

DOD:12-27-13		<p>VICTORIA PUMO, Daughter and Named Executor without bond, is Petitioner.</p> <p>Petitioner is a resident of Castle Rock, Colorado.</p> <p>Full IAEA: ok</p> <p>Will dated 10-20-05</p> <p>Residence: Fresno Publication: Fresno Bee</p> <p>Estimated value of estate: Personal property: \$30,000 Real property: \$175,000 Total: \$205,000</p> <p>Probate Referee: Rick Smith</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 2-19-14 – the following issues remain:</p> <p>1. Decedent's will is not self-proving. (It is not witnessed other than by the notary.) Therefore, need Proof of Subscribing Witness (DE-131) pursuant to Probate Code §8220 or other proof pursuant to Probate Code §8221.</p> <p>Declaration filed 4-21-14 states that the will was prepared by an unknown attorney and that attempts to locate the notary have been unsuccessful. The notary no longer has an active license in California. Petitioner states the decedent prepared and signed his will on 10-20-05 and sent a copy to Petitioner shortly thereafter. After his death, Petitioner retrieved the original and presented it for filing. Petitioner states she and her father maintained a close relationship and regular contact until his death and there is no reason to believe that any other will, codicil, or other instrument pertaining to distribution of his assets exists. Petitioner states she has discussed the matter with her father's siblings who also had a close relationship with him and all concur that the will dated 10-20-05 was his last will.</p> <p>2. Petitioner resides in Colorado. The Court may require bond if the personal representative resides outside of California. Probate Code §8571 and Cal. Rules of Court 7.201 (b). If required, bond should be fixed at \$205,000.00.</p> <p>Petitioner requests that she be appointed without bond and states she believes that no named heir would object to waiving bond. (However, no waivers are provided. The Court may require signed waivers of bond from all heirs.</p> <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Thurs, 6-12-14 at 9:00a.m. in Dept. 303 for the filing of the bond and • Thurs, 9-25-14 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Thurs, 9-24-15 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
Cont. from 021914			
Aff.Sub.Wit.	X		
✓ Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg	X		
Aff.Mail	X		
Aff.Pub.	X		
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: skc			
Reviewed on: 4-28-14			
Updates:			
Recommendation:			
File 19 – Fees			