



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.

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

	PUBLIC GUARDIAN , Conservator of the Estate, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: The Court will set a status hearing for the filing of the Fifth Account as follows:</p> <ul style="list-style-type: none"> Tuesday, May 1, 2018
	Account period: 3/27/14 – 3/11/16	
	Accounting: \$53,721.57	
	Beginning POH: \$ 2,707.56	
	Ending POH: \$ 3,133.94 (\$1,958.94 cash)	
	Conservator: \$778.96 (for 3.76 Deputy hours @ \$96/hr and 5.50 Staff hours @ \$76/hr, itemized at Exhibit B)	
	Attorney: \$1,250.00 (less than local rule)	
	Bond fee: \$50.00 (minimum \$25/year)	
	Due to the insufficiency of the estate, Petitioner requests an order imposing a lien against the estate for any unpaid balance of the authorized fees and commissions.	
	Petitioner requests an order:	
	1. Approving, allowing, and settling the account and report;	
	2. Authorizing the Conservator's and Attorney's compensation;	
	3. Authorizing payment of the bond fee;	
	4. Imposing a lien against the estate for any unpaid balance of the authorized compensation; and	
	5. Issuing any other orders the Court considers proper.	
<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 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: skc
		Reviewed on: 4/28/16
		Updates:
		Recommendation:
		File 1- Pope

Attorney Nancy J. LeVan (for Petitioner Gary Morris, Jr., Beneficiary)
 Attorney Jennifer Walters (for Walter A. Morris, Successor Trustee)

Petition to Compel Accounting by Trustee of the Gary F. Morris, Sr. 2013 Trust and Petition for Distribution of Trust Assets to Doug Standing, Trustee of the Gary Morris, Jr. Trust and Petition for Fees and Costs

DOD: 10/19/2013	GARY MORRIS, JR. , Beneficiary, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Petitioner states:	Page 5B is a Fee Waiver Review.
	<ul style="list-style-type: none"> WALTER A. MORRIS was appointed as Successor Trustee of the GARY F. MORRIS, SR., 2013 TRUST on 4/1/2014 [copy of Trust attached as Exhibit A to Declaration of Clerical Error and Omissions filed 10/2/2015]; The GARY F. MORRIS, SR., 2013 TRUST terms provide that the balance of the Trust estate, including all assets poured into the Trust as a result of Trustor's death, is to be distributed to BARBARA TURNER, Trustee of the GARY F. MORRIS, JR., TRUST; BARBARA TURNER resigned as Trustee of both Trusts, and WALTER A. MORRIS was appointed as Successor Trustee; Petitioner requests the Court compel WALTER A. MORRIS, as Trustee of the GARY F. MORRIS, SR., 2013 TRUST, to distribute the remaining assets in the GARY F. MORRIS, SR., 2013 TRUST to DOUG STANDING, Trustee of the GARY F. MORRIS, JR., TRUST within 30 days of the order approving this petition; GARY F. MORRIS, SR., 2013 TRUST terms provide that the Trustee shall periodically, but not less than once each year, render an account of its administration of the Trust(s) under the Trust instrument to all current income beneficiaries; GARY F. MORRIS, SR's., date of death is 10/9/2013 [sic]; WALTER A. MORRIS was appointed as Successor Trustee on 4/1/2014; to date, no accounting has been received from WALTER A. MORRIS. ~Please see additional page~ 	Continued from 3/15/2016. Minute Order states counsel is in disagreement as to what has been provided. If all of the information has not been provided by 5/3/2016, then Walter Morris is ordered to be personally present or present via CourtCall on 5/3/2016.
Cont. from 100615, 111715, 010516, 020916, 031516		Notes for background:
Aff.Sub.Wit.		<ul style="list-style-type: none"> Minute Order dated 1/5/2016 from the last hearing states Ms. Walters represents that there have been continued difficulties in obtaining the bank statements, but the accounting is otherwise completed and ready for filing. Ms. LeVan agrees to the accounting being filed without the missing statements; Ms. Walters will proceed with the filing. Court records do not show an accounting has been filed as of 3/10/2016. Order on Ex Parte Petition for Payment of Allowance to Gary Morris, Jr. for Housing Pursuant to Article 2, Section 2.04(D) of the Gary Morris, Sr. Revocable Trust dated 9/3/2013 filed on 1/29/2016 was withdrawn and dismissed on 3/10/2016.
✓ Verified		Reviewed by: LEG
Inventory		Reviewed on: 4/29/16
PTC		Updates:
Not.Cred.		Recommendation:
✓ Notice of Hrg		File 5A – Morris
✓ Aff.Mail W /		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/S		
Objections		
Video Receipt		
CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Petitioner prays the Court Order:

1. An accounting from **WALTER A. MORRIS** from the period when he was Successor Trustee of the **GARY F. MORRIS, SR., 2013 TRUST** from 4/1/2014 until 8/31/2015;
2. **WALTER A. MORRIS**, Successor Trustee of the **GARY F. MORRIS, SR., 2013 TRUST**, [shall] distribute all of the remaining assets in the **GARY F. MORRIS, SR., 2013 TRUST** to **DOUG STANDING**, Trustee of the **GARY F. MORRIS, JR., TRUST** within 30 days of the signed of the order approving this *Petition*;
and
3. Allowing attorney fees and costs to Petitioner to be paid by Walter Morris for failure to file accounting and distribute assets pursuant to **GARY F. MORRIS, SR., 2013 TRUST** terms.

Notes:

- *Petition* was filed using a fee waiver, which is currently pending. The **\$435.00** filing fee is appropriately payable from Trust assets. *Declaration of Clerical Error and Omissions* filed 10/2/2015 states Petitioner agrees that a filing fee should be paid by Walter Morris, Trustee of the **GARY F. MORRIS, SR., 2013 TRUST**; however, Walter Morris is not communicating with the beneficiary, Gary Morris, Jr., his attorney, nor the Successor Trustee of the **GARY F. MORRIS, JR., TRUST**; the beneficiary has no access to funds of the Trust.
- *Order Setting Bond Amount* filed 4/25/2015 set bond at **\$286,000.00**, proof of which was filed on 5/9/2014. *Order Reducing Bond Amount* filed 5/13/2015 finds that the bond amount for **WALTER A. MORRIS**, as Trustee of the **GARY F. MORRIS, SR., 2013 TRUST** is reduced to **\$152,137.88**, which is the amount of net proceeds [*distributed to the seller of the Trust real property*] plus 10%.
- *Declaration of Clerical Error and Omissions* filed 10/2/2015 attaches as *Exhibit B* a copy of the bond renewal that was mailed to Walter Morris, and states it is unknown what Walter Morris did with it.

Attorney Nancy J. LeVan (for Petitioner Gary Morris, Jr.)

Fee Waiver Review

DOD: 10/19/2013		NEEDS/PROBLEMS/COMMENTS:
Cont. from 100615, 111715, 010516, 020916, 031516		
<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	
<input type="checkbox"/>	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	
		Reviewed by: LEG
		Reviewed on: 4/29/16
		Updates:
		Recommendation:
		File 5B – Morris

Probate Status Hearing RE: Informal Account of \$10,000.00 Closing Reserve

DOD: 2/27/14	The First and Final Account and Petition for Final Distribution of JANELLE HOVSEPIAN , Administrator, was approved on 8/11/15.	NEEDS/PROBLEMS/COMMENTS:
	The final accounting included a \$10,000.00 closing reserve.	1. Need informal accounting of closing reserve 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.
Cont. from	Pursuant to Local Rule 7.12.6 the Court set this status hearing for the filing of an informal accounting of the \$10,000.00 closing reserve.	
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: KT
		Reviewed on: 4/28/16
		Updates:
		Recommendation:
		File 6- McIntire

8 Jayden Freitas & Beau Freitas (GUARD/P)

Case No. 14CEPR01031

Petitioner Freitas, Amanda Jean (Pro Per – Mother)

Objectors Azevedo, Codie (Pro Per – Co-Guardian)

Objector Azevedo, Nicholas (Pro Per – Co-Guardian)

Petition for Visitation

Jayden, 13	AMANDA JEAN FREITAS, Mother, is Petitioner.		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 03/08/2016: The court admonishes the guardians to let Amanda Frietas know about the medical appointments, but Ms. Freitas is not to attend the appointments. Ms. Frietas is to notify the guardians 24 hours ahead of time if she is going to attend a school event in order for the minors to be prepared. This matter is continued to determine the outcome of the hearing in Kings County on 04/14/2016 with regard to the active warrant for Ms. Frietas.</p> <p>The following issues remain:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing on Guardians Codie and Nicholas Azevedo.
Beau, 8	CODIE and NICHOLAS AZEVEDO, Maternal Aunt and Uncle, were appointed guardians on 1/28/15. Objection filed 03/04/2016		
Cont. from 120115, 012616, 030816	<u>Please see petition for details</u>		
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	n/a		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: LV			
Reviewed on: 04/28/2016			
Updates:			
Recommendation:			
File 8 – Freitas			

Probate Status Hearing Status Hearing Re: Filing of the First Account

DOD: 1/15/15	DUSTIN C. REYNOLDS was appointed as Administrator with Limited IAEA authority and with bond set at \$20,000.00 on 3/27/15.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need first account, 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.</p>
Cont. from	Bond was filed on 4/22/15.	
Aff.Sub.Wit.	Letters issued on 4/29/15.	
Verified	I & A filed 7/30/15 shows the estate valued at \$155,776.21.	
Inventory	Minute order dated 3/27/15 set this status hearing for the filing of the first account or petition for final distribution.	
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: KT
		Reviewed on: 4/28/16
		Updates:
		Recommendation:
		File 9- Reynolds

10 Ayden Mendoza, Julianna Mendoza (GUARD/P) Case No. 15CEPR00477

Guardian: Aneissa Garcia (pro per)

Petitioner: Alexis Garcia (pro per)

Petition for Visitation

		ALEXSIS GARCIA , mother, is petitioner.	<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. Aneissa Garcia (guardian)
		ANEISSA GARCIA , maternal aunt, was appointed guardian on 8/19/15.	
		Please see petition for details.	
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 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 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: 4/28/16
			Updates:
			Recommendation:
			File 10- Mendoza

11A Benny Markarian (Estate)

Case No. 15CEPR00668

Attorney Harris, Richard A. (for Pamela Milam – Petitioner – Daughter)

Attorney Nahigian, Eliot (for Ronald Markarian - Son)

Petition for Probate of Will and for Letters Testamentary with IAEA

DOD: 05/15/2015	PAMELA MILAM , daughter/named executor without bond is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 03/22/2016: Continued per Stipulation and Order filed 03/15/2016.</p> <p>Page 11B is the Status Hearing for the filing of a Will Contest/Competing Petition.</p> <p>1. Proposed personal representative is a resident of Florida. Probate Code 8571 states notwithstanding a waiver of bond, the court in its discretion may require a nonresident personal representative to give a bond in an amount determined by the court.</p> <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Tuesday, 06/07/2016 at 9:00a.m. in Dept. 303 for the filing of the Bond if required and • Tuesday, 10/04/2016 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Tuesday, 07/11/2017 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>
	Petitioner is a resident of Miramar Beach, Florida.	
	Full IAEA – o.k.	
Cont. from 081815, 092915, 120815, 032216	Will dated: 02/20/2008	
<input type="checkbox"/> Aff.Sub.Wit.	Residence: Fresno	
<input checked="" type="checkbox"/> Verified	Publication: The Business Journal	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Estimated Value of the Estate:	
<input checked="" type="checkbox"/> Aff.Mail w/	Personal property - \$129,300.00	
<input checked="" type="checkbox"/> Aff.Pub.	Real Property - \$160,000.00	
<input type="checkbox"/> Sp.Ntc.	Total - \$289,300.00	
<input type="checkbox"/> Pers.Serv.	Probate Referee: Steven Diebert	
<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: 04/28/2016		
Updates:		
Recommendation:		
File 11A – Markarian		

11B Benny Markarian (Estate) Case No. 15CEPR00668

Attorney Harris, Richard A. (for Pamela Milam – Petitioner – Daughter)

Attorney Nahigian, Eliot (for Ronald Markarian - Son)

Probate Status Hearing RE: Filing of a Will Contest/Competing Petition

	<p>PAMELA MILAM, daughter, filed a Petition for Probate of Will and for Letters Testamentary with IAEA on 08/18/2015.</p> <p>Minute Order of 09/29/2015 set this Status Hearing for the filing of a Will Contest/Competing Petition.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>As of this Examiner’s review on 04/28/2016 no Will Contest/Competing Petition have been filed.</p>
Cont. from 120815, 032216		
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: 04/28/2016
		Updates:
		Recommendation:
		File 11B – Markarian

12A Bee Pha (Estate)

Case No. 15CEPR01097

Attorney: Mark J. Castro (for Petitioner Neng Vang)

Petition for Letters of Administration; Authorization to Administer Under the Independent Administration of Estates Act with Limited IAEA Authority.

DOD: 3/5/15		<p>NENG VANG is petitioner and requests BEE PHA be appointed Executor with bond set at \$10,000.00.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 2/9/16. Minute order states Counsel Represents that he is awaiting the outcome of litigation, and that there is a trial date of 2/17/16 for said litigation. The court admonishes that an amended petition is still necessary.</p>
Cont. from 121515, 020916		Limited IAEA -	<p>NEED AMENDED PETITION based on but not limited to the following:</p> <ol style="list-style-type: none"> #2b(1) of the Petition requests Bee Pha be appointed as Executor. It is unclear who Bee Pha is. It appears that this may be the decedent and the name was placed there in error. Petition does not indicate whether or not the decedent died testate or intestate. #3d or 3e of the petition. #2b(1) of the petition requests appointment as executor. #3f(2)(a) requests appointment as administrator. Need clarification. Need date of death of spouse. Local Rule 7.1.1D. #5a(3) or 5a(4) of the petition was not answered re: registered domestic partner. #5a(5) or 5a(6) of the petition was not answered re: child/no child. Petitioner Neng Vang and proposed personal representative Bee Pha are not listed at #8 of the petition as required. Need Affidavit of Publication. Need Notice of Petition to Administer the Estate with proof of service on all interested parties. Need Duties and Liabilities and supplement to the Duties and Liabilities. Need orders and letters
<input type="checkbox"/>	Aff.Sub.Wit.	Decedent died testate or intestate? (see #2)	
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory	Residence: Fresno	
<input type="checkbox"/>	PTC	Publication: NEED	
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	Estimated value of the Estate:	
<input type="checkbox"/>	Aff.Mail	Real property	
<input type="checkbox"/>	Aff.Pub.	- \$150,000.00	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters	Probate referee: Rick Smith	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	X	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 4/28/16
			Updates:
			Recommendation:
			File 12A - Pha

Probate Status Hearing RE: Filing of an Amended Petition

DOD: 3/5/15	<p>NENG VANG filed a Petition for Probate and requested BEE PHA be appointed Executor with bond set at \$10,000.00.</p> <p>The petition had a lot of deficiencies (see page 12A). The Court set this status hearing for the filing of an amended petition.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 2/9/16. Minute order states Counsel Represents that he is awaiting the outcome of litigation, and that there is a trial date of 2/17/16 for said litigation. The court admonishes that an amended petition is still necessary.</p> <p>1. Need amended petition.</p>
Cont. from 020916		
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: KT
		Reviewed on: 4/28/16
		Updates:
		Recommendation:
		File 12B- Pha

**13A The A. James Doyle, Jr., Trust Dated 4/19/04, Case No. 15CEPR01158
as amended and restated on 5/14/14**

Page 2

Petitioners state Richard Doyle and Mr. Borchardt began administering the trust thereafter and allege that they sold Mr. Doyle's home and disposed of some of his personal property and established accounts at Charles Schwab in their names as co-trustees.

Petitioners came to learn that their sister, Ms. FISHINGHAWK, had established several bank accounts at Bank of America in her name and Mr. Doyle's name as co-owners, and allege that all funds in the accounts were the property of Mr. Doyle. Petitioners further came to believe that Ms. FISHINGHAWK had misappropriated funds from the accounts, and shared their concerns with the co-trustees. After expressing their concerns, Petitioners received a copy of IRS Form 1099 reflecting that Ms. FISHINGHAWK had received \$109,565 from the trust in 2014, although both co-trustees denied making payments to her or knowing that she had exercised authority over the trust and nontrust accounts and paid monies to herself.

Concerned, Petitioners requested that the co-trustees provide a written accounting of the trust on 2/11/15. Neither co-trustee has responded. Throughout 2015, Petitioners continued to express concerns to the co-trustees, to attorney Flanigan, and to Ms. FISHINGHAWK concerning management of their father's finances. Petitioners were hopeful that the family members could work out a solution among themselves without involving the court.

On or about 9/1/15, both co-trustees resigned. Presently, there is no successor trustee in place to manage assets of the trust and a vacancy exists that must be filled. Ms. FISHINGHAWK expressed that she would like to serve as successor trustee, but Petitioners disagree that she would be an appropriate choice. Further, since appointment of the Public Guardian as temporary conservator of Mr. Doyle's estate, Petitioners have been informed that there is very little cash held in his name to which the PG has access, and therefore believe the remaining cash assets are held in trust.

Petitioners respectfully request the Court order that former Co-Trustees, Richard Doyle and Thomas Borchardt, shall present an account and report of their administration of the trust commencing 5/14/14 through 9/1/15, the date of their resignation, and shall file same with the court and serve notice of hearing thereon to all interested persons; and any and all other relief the Court deems just and proper.

**13B The A. James Doyle, Jr., Trust Dated 4/19/04, Case No. 15CEPR01158
as amended and restated on 5/14/14**

Attorney **Burnside, Leigh W. (for Petitioners DeeAnn Doyle Summers and John Doyle)**

Probate Status Hearing

	DEEANN DOYLE SUMMERS and JOHN DOYLE filed Ex Parte Petition for Appointment of Successor Trustee, or Alternatively, Temporary Successor Trustee on 11/20/15.	NEEDS/PROBLEMS/COMMENTS: Continued from 1/26/16. Nothing further has been filed in connection with this status hearing.
Cont. from 012616	The petition requested that Marion Austin of Central Valley Fiduciary Services, Inc., is appointed successor trustee without bond.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC	The Court set the matter for hearing on 12/10/15.	
Not.Cred.		
Notice of Hrg	On 12/10/15, the Court granted the petition and set this status hearing for review of the proceeding.	
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: 4/27/16
		Updates:
		Recommendation:
		File 13B- Doyle

13B

Petition for Appointment of Guardian of the Person

		<u>TEMPORARY EXPIRES 5/3/2016</u>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute order dated 3/15/16 states mother represents that petitioner is unable to be present in court because minor is ill. The Court directs the clerk to mail examiner notes to petitioner so she can cure defects before the next hearing. Matter is continued to 5/3/16 for completion of the reciprocal investigation from San Joaquin County.</p> <p>1. Declarations of due diligence filed on paternal grandmother and paternal grandfather. If Court does not excuse notice need proof of service 15 days prior to the hearing of the <i>Notice of Hearing</i> along with a copy of the petition for appointment <u>or</u> consents and waivers of notice for:</p> <ul style="list-style-type: none"> a. Gilbert Murrieta (paternal grandfather) b. Dolores Pastore (paternal grandmother) <p>See additional page.</p>	
		<p>VICTORIA MADRID, maternal aunt, is petitioner</p> <p>Court Investigator report dated 3/10/2016.</p> <p>CI supplemental report filed 4/25/16.</p>		
Cont. from 031516		<p><i>See petition for details.</i></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 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: 4/28/2016		
		Updates:		
		Recommendation:		
		File 14- Guzman		

NEEDS/PROBLEMS/COMMENTS, *continued*:

2. Petition lists four siblings. If siblings are 12 years or older, need proof of service 15 days prior to the hearing of the *Notice of Hearing* along with a copy of the petition for appointment or consents and waivers of notice for:
 - a. Inez Guzman
 - b. Mary Jane Alvarez
 - c. X'ayvier Alvarez
 - d. Lorenzo Guzman-Murrieta

15 Andrew Gonzales, Javier Gonzales (GUARD/P) Case No. 16CEPR00121

Petitioner: Gloria Alice Gonzales (Pro per – Paternal grandmother)

Petitioner: Rudy Gonzales (Pro per – Paternal grandfather)

Petition for Appointment of Guardian of the Person

		<u>TEMPORARY EXPIRES 5/3/2016</u>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. UCCJEA indicates minors have lived with petitioners since January 2016, but it does not list minors' residence information for the past five years, as required.</p>
Cont. from 040516			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	x	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	w/	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			<p>Reviewed by: SEF</p> <p>Reviewed on: 4/28/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 15- Gonzales</p>

GLORIA GONZALES and RUDY GONZALES, paternal grandparents, are petitioners and were appointed temporary co-guardians on 2/17/16.

Court Investigator report filed 3/29/16.

See petition for details.

Petition for Appointment of Guardian of the Person

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. ICWA-030 Declaration of Mailing indicates the attorney mailed the notice registered or certified on 2/25/16; however, no receipts have been filed pursuant to Cal. Rule of Court 7.1015(c)(5). Need proof of receipt of ICWA-030 by:</p> <ul style="list-style-type: none"> - Paula Kay Williams (Mother) - Steven Cagle (Father) - Sacramento Area Director Bureau of Indian Affairs - Secretary of the Interior - Caddo Tribe <p>2. Need <u>completed</u> proposed order. (Proposed order submitted is incomplete.)</p>	
	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			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 4/28/16	
			Updates:	
			Recommendation:	
			File 16- Cagle	

Petition to Determine assets of Decedent as Property of an existing Trust

<p>Kenji Maruko DOD: 6/23/14</p>	<p>WARREN K. MARUKO, Successor Trustee, is Petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
	<p>Petitioner states Kenji Maruko executed an inter vivos declaration of trust entitled The Maruko Family Trust on 4/24/07 (Exhibit B) and assigned, transferred and delivered to himself as trustee the real property described on Schedule A attached to the Declaration of Trust, including certain real property located at 37641 Auberry Road, Clovis, CA. The property was described twice because there are two separate APNs associated with the same common property address.</p>	<p>1. The legal description attached at Exhibit A appears to be incomplete (missing Page 1). The Court may require verification of the legal description as attached to the order.</p>
<p><input type="checkbox"/> Aff.Sub.Wit.</p>		
<p><input checked="" type="checkbox"/> Verified</p>		
<p><input type="checkbox"/> Inventory</p>		
<p><input type="checkbox"/> PTC</p>		
<p><input type="checkbox"/> Not.Cred.</p>		
<p><input checked="" type="checkbox"/> Notice of Hrg</p>		
<p><input checked="" type="checkbox"/> Aff.Mail</p>	<p>Kenji Maruko died 6/23/14. Upon his death, Petitioner Warren K. Maruko became the successor trustee.</p>	
<p><input type="checkbox"/> Aff.Pub.</p>		
<p><input type="checkbox"/> Sp.Ntc.</p>		
<p><input type="checkbox"/> Pers.Serv.</p>		
<p><input type="checkbox"/> Conf. Screen</p>	<p>On the date of his death, Kenji Maruko held the real property individually rather than as trustee. Petitioner states the intent to hold the real property in trust is evidenced by the fact that the real property is described on Schedule A.</p>	
<p><input type="checkbox"/> Letters</p>		
<p><input type="checkbox"/> Duties/Supp</p>		
<p><input type="checkbox"/> Objections</p>		
<p><input type="checkbox"/> Video Receipt</p>	<p>Memorandum of Points and Authorities cites <i>Estate of Heggstad</i>.</p>	
<p><input type="checkbox"/> CI Report</p>		
<p><input type="checkbox"/> 9202</p>		
<p><input checked="" type="checkbox"/> Order</p>	<p>Petitioner prays for an order adjudging that:</p>	
<p><input type="checkbox"/> Aff. Posting</p>	<p>1. Kenji Maruko died on 6/23/14, a resident of Fresno County, CA;</p>	<p>Reviewed by: skc</p>
<p><input type="checkbox"/> Status Rpt</p>	<p>2. Kenji Maruko, during his lifetime, created a revocable inter vivos living trust by declaration of trust dated 4/24/07 as trustor and trustee;</p>	<p>Reviewed on: 4/28/16</p>
<p><input type="checkbox"/> UCCJEA</p>	<p>3. Warren K. Maruko became the successor trustee upon the death of Kenji Maruko;</p>	<p>Updates:</p>
<p><input type="checkbox"/> Citation</p>	<p>4. That despite the vesting of the real property described above, the real property is a part of the trust estate; and</p>	<p>Recommendation:</p>
<p><input type="checkbox"/> FTB Notice</p>	<p>5. Such further orders as the Court deems appropriate.</p>	<p>File 17- Maruko</p>

Petition for Appointment of Probate Conservator

		<p>THERE IS NO TEMPORARY. No temporary was requested.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
		<p>SILVER KELLEY, sister and HEIDI SIMON, niece, are petitioners.</p>	<p>Court Investigator Advised Rights on 4/22/16.</p>
Cont. from		<p>Please see petition for details.</p>	<p>1. #1e and 1f of the Petition requests orders relating to Probate Code §1873 or 1901 and §2351-2358 without any explanation. <u>Note:</u> Generally, the powers under this section are part of a general conservator and are only requested if the petitioner wishes the conservatee to retain any of those powers.</p>
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	<p>Court Investigator Report filed on 4/26/16</p>	<p>2. Petition requests medical consent powers. Need Capacity Declaration.</p>
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		<p>3. Petition does not state why a conservatorship is necessary (#5c of the petition).</p>
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		<p>4. Need Conservatorship Video Viewing Certificate.</p>
<input checked="" type="checkbox"/>	Aff.Mail	W/	
<input type="checkbox"/>	Aff.Pub.		<p>5. Need Order.</p>
<input type="checkbox"/>	Sp.Ntc.		
<input 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	X	
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	X	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input checked="" type="checkbox"/>	Citation	W/	
<input type="checkbox"/>	FTB Notice		
			<p>Reviewed by: KT</p>
			<p>Reviewed on: 4/28/16</p>
			<p>Updates:</p>
			<p>Recommendation:</p>
			<p>File 18- Eudy</p>

Petition for Appointment of Probate Conservator of the Person

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator advised rights on 4/1/16</p> <p>Voting rights affected – need minute order.</p>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			W
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
✓	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 4/28/16	
			Updates:	
			Recommendation:	
			File 19- Chavez	

20 Yalena Martinez, Xzander Martinez & Jesse Frutoz (GUARD/P)
Case No. 13CEPR00759

Petitioner: Deborah Martinez (pro per)
 Petitioner: Leslie Galvan (pro per)
 Petitioner: Hector Galvan (pro per)

Petition for Appointment of Temporary Guardian of the Person

<u>GENERAL HEARING 6/6/16</u>		NEEDS/PROBLEMS/COMMENTS:	
DEBORAH MARTINEZ, maternal grandmother, LESLIE GALVAN and HECTOR GALVAN, maternal aunt and uncle, are petitioners.		<p>This petition is as to Yalena only.</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service of the Notice of Hearing along with a copy of the petition or consent and waiver of notice or declaration of due diligence on: <ol style="list-style-type: none"> a. Adam Soto (father) 	
Cont. from 041916			
<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		
<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 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: KT	
		Reviewed on: 4/28/16	
		Updates:	
		Recommendation:	
		File 20- Martinez & Frutoz	

Petition for Appointment of Temporary Conservator of the Person

See petition for details.			<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) on Proposed Conservatee Georgina Caballero. 3. Need proof of service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing on relatives listed at #11 per Probate Code §2250(e).
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen	X	
✓	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 4/28/16
			Updates:
			Recommendation:
			File 21- Caballero

22 Emma Lang (GUARD/E)

Case No. 16CEPR00433

Petitioner Lousberg, Alma D. (Pro Per – Mother)

Petition for Appointment of Temporary Guardian of the Estate

Age: 11		<p align="center"><u>GENERAL HEARING 06/01/2016</u></p> <p>ALMA D. LOUSBERG, mother, is petitioner and requests appointment as Guardian of the Estate.</p> <p align="center"><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Petitioner filed a Petition to Determine Succession on 04/04/2016, in Probate Case No. 16CEPR00367. The hearing is set for 05/12/2016.</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 type="checkbox"/>	Notice of Hrg			n/a
<input type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			n/a
<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 type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		Reviewed by: LV		
		Reviewed on: 04/28/2016		
		Updates:		
		Recommendation:		
		File 22- Lang		

Petition for Appointment of Temporary Conservator of the Person and Estate

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:
			Court Investigator to advise rights, file report.
			1. Need Notice of Hearing.
			2. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) on the Proposed Conservatee, Gilberto Artega Medrano.
			3. Need proof of service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) on all relatives listed at #11:
			- Helen Sandoval, Spouse
			- Agripina Medrano, Sister
			- Francisco Medrano, Brother
			- Nefina Arteago, Sister
			- Benjamin Lopez, Son
			- Enrique Lopez, Son
			- Josephina Lopez, Daughter
			- Gilbert Medrano, Son
			4. The Court may require clarification re the request for conservatorship of the estate with reference to Local Rule 7.15.4., which states that when the only asset of a proposed Conservatee is public benefits, conservatorship of the estate is not required.
			5. If granted, bond will be required in the amount of \$11,880.00, which includes cost of recovery pursuant to Probate Code §2320(c) and Cal. Rule of Court 7.207.
			Reviewed by: skc
			Reviewed on: 4/28/16
			Updates:
			Recommendation:
			File 23- Medrano
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report	X	
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		