

**Status Hearing Re: Failure to File a First Account or Petition for Final Distribution.**

<b>DOD: 5/18/07</b>	<p><b>ALICE HOUSTON</b>, Daughter, was appointed Administrator with Full IAEA with bond of \$67,000.00 on 10/26/10.</p> <p>Bond was filed 3/21/11 and Letters issued on 3/29/11.</p> <p>A Final Inventory and Appraisal was filed 8/4/11 reflecting real property in Fresno valued at \$335,000.00.</p> <p>Thereafter, nothing was filed.</p> <p>The Court sent Notice of Status Hearing to the attorney and the Administrator on 3/9/16, and to the attorney at a new address on 3/24/16.</p> <p>Notice states both the attorney and the personal representative are ordered to appear at the hearing unless a first account or petition for final distribution has been filed.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>1. Need first account or petition for final distribution pursuant to Probate Code §12200 or written status report pursuant to Local Rule 7.5.</b></p>
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 4/28/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 1- Tims</b></p>	

**Probate Status Hearing Re: First Accounting or Petition for Final Distribution**

<b>DOD: 10/3/1994</b>	<b>ROBERT L. JOHNSON</b> was appointed Administrator without bond and with Limited IAEA authority on 7/31/12.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Letters issued 7/31/12.	
<b>Cont. from 100413, 121313, 032814, 072514, 111214, 042215, 060315, 080515, 101415, 120915, 021016, 031616</b>	I & A filed on 9/11/12 shows an estate valued at \$40,000.00	<b>Continued from 3/16/16. Minute order states</b> Counsel represents that the Administrator's wife has been ill and he has not been able to obtain the final bank statements necessary for the final account.
	<b>Minute order dated 7/31/12</b> set a status hearing on 10/4/13 for the filing of the First Account or Petition for Final Distribution. Minute order indicates Mr. Rindlisbacher was present.	
<b>Aff.Sub.Wit.</b>		<p>1. <b>Need first account, petition for final distribution or current written status report</b> pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p> <p><b>Examiner notes</b> Sam Johnson Jr. survived the decedent (petition for probate indicates he died in 2004 or 2005) and declaration filed on 7/23/14 states Sam passed away after the decedent. Therefore, the estate of Sam Johnson Jr. is the other beneficiary of this estate and not his two children.</p>
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: KT</b>
		<b>Reviewed on: 4/28/16</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 2 - Johnson</b>

Attorney  
Attorney

Kruthers, Heather H. (for Public Administrator)  
Milnes, Michael A. (for Contestants Hope De Santiago and Stephen Galvan)

Petition for Probate of Will and for Letters of Administration with Will Annexed;  
Authorization to Administer Under the Independent Administration of Estates Act

DOD: 10/3/11		<b>FRESNO COUNTY PUBLIC ADMINISTRATOR</b> is Petitioner and requests appointment as Administrator with Will Annexed with Full IAEA without bond.  Full IAEA – ok  Will dated 8/11/09  Residence: Fresno Publication: Business Journal  Estimated value of estate: Real property: \$311,000.00  Probate Referee: Rick Smith  <b>Contest and Grounds for Objection to Probate of Purported Will &amp; of Appointment of Personal Representative was filed 3/16/16. See Page 2.</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Minute Order 4/6/16: Mr. Milnes is admonished to address the defects in the will contest.</u>  <u>Note: Contest and Grounds for Objection to Probate of Purported Will &amp; of Appointment of Personal Representative was filed 3/16/16; however, it does not appear that a summons was submitted therewith for issuance pursuant to Probate Code §8250, and because the document indicated this continued hearing date of 4/6/16, the Contest was not assigned it's own separate hearing date at the counter.</u>  <u>Due to notice requirements, the Contest cannot be heard on 5/4/16. The Court will set the Contest for noticed hearing pursuant to Probate Code §8250 at this time.</u>  <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p>	
Cont. from 121515, 012716, 030216, 040616				
<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			
<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 type="checkbox"/>	Duties/Supp			
<input checked="" 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: 4/28/16				
Updates:				
Recommendation:				
File 3 - Galvan				

Page 2

**Contest and Grounds for Objection to Probate of Purported Will & of Appointment of Personal Representative filed 3/16/16 BY Hope De Santiago and Stephen Galvan, daughter and son, states:**

A document dated 8/11/09 purporting to be the last will was filed in this court on 11/9/11. Petitioners are informed and believe and thereon allege that the decedent left no valid Will. Probate of the purported will should be denied on the following grounds:

1. The decedent was not of sound and disposing mind and therefore lacked testamentary capacity at the time of the alleged execution of the purported will.
2. At the time of signing, the decedent was fluent in the Spanish language and not the English language use dint he purported will, and the decedent was not able to read or understand documents written in the English language. As a result, the decedent was not able to understand or comprehend the meaning and effect of the English words used in the purported will and their significance, therefore the decedent lacked testamentary intent and the signature of the decedent to the purported will was executed by the decedent under a mistake as to its legal effect.
3. Petitioners allege the purported will is not and never was the decedent's will as it was made as a direct result of undue influence on the decedent by his son, **ARTHUR G. GALVAN**, and other members of his family, and it is now (sic) and never was the will of the decedent.

See contest for description of the undue influence.

**Contestants also object to appointment of the Public Administrator.** Petitioners state on 5/10/13, the PA was appointed under Probate Code §7660 in **13CEPR00400** and since that date has served in that capacity. In connection with this new appointment, the PA failed to give proper notice to the intestate heirs

**NEEDS/PROBLEMS/COMMENTS:**

1. **Petitioner lists only the decedent's four living children at #8; however, it appears that there are additional people entitled to notice of this proceeding, including:**
  - Vanessa Galvan (Daughter of deceased son Frank Garcia Galvan, mentioned in the will)
  - Vivian Saicon (Granddaughter and Named alternate executor and former conservator of the person)

Therefore, need revised declaration re #8 and proof of service of Notice of Petition to Administer Estate on Vanessa Galvan and Vivian Saicon at least 15 days prior to the hearing per Probate Code §8110.

**Note:** Petitioner's #8 indicates that the will provides for distribution to a trust; however, that does not appear to be the case. Need clarification.

2. Need date of death of Frank Garcia Galvan per Local Rule 7.1.1.D. **Note:** Declaration filed 2/26/16 indicates a date of death for a David Garcia Galvan. Is this a typo? There is no David listed at #8.

**Note:** If granted, the Court will set status hearings as follows:

- Wednesday Oct. 5, 2016 for filing Inventory and Appraisal
- Wednesday July 5 2017 for filing the first account or petition for final distribution

Dept. 303, 9:00 a.m. Wednesday, May 4, 2016

**Petition for Order Approving Settlement Agreement; and for Order Determining Distribution Provisions of Trusts**

	<b>CASEY S. ROGERS</b> , Trustee, is Petitioner and requests that this Court enter an Order Approving the Settlement Agreement and Mutual Release of All Claims entered into by and among: <b>Trustee Casey S. Rogers, Patricia Elaine Coffman, and Susan Jean Frantzich</b> as set forth in Exhibit A.		<b>NEEDS/PROBLEMS/COMMENTS:</b>
	See petition and settlement agreement for details.		
	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: skc
			Reviewed on: 4/28/16
			Updates:
			Recommendation:
			File 4- Ford

**Status RE: Filing of the First Account**

	<b>DAN HABIB</b> , Son, was appointed Conservator of the Estate with bond of \$294,360.00 on 1/26/15. Bond was filed and Letters issued on 2/17/16.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p style="text-align: center;"><b><u>OFF CALENDAR</u></b></p> <p>First and Final Account filed 5/3/16 is set for hearing on 6/14/16.</p>
<b>Cont. from 033016</b>	<b>The FRESNO COUNTY PUBLIC GUARDIAN</b> was appointed Conservator of the Person on 1/26/15.	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	At the hearing on 1/26/15, the Court set this status hearing for the filing of the first account.	
<b>Aff.Mail</b>	<b>Status Report filed 5/2/16 states</b> it is expected that the petition will be filed on Tuesday, 5/3/16.	
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 4/28/16
		<b>Updates:</b> 5/2/16, 5/3/16
		<b>Recommendation:</b>
		<b>File 5- Habib</b>

Petition for Appointment of Guardian of the Person

	See petition for details.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Minute Order 3/23/16</u>: Examiner notes provided in open court.</p> <p>The following remains noted:</p> <ol style="list-style-type: none"> <li>Petitioner filed declarations of due diligence re the father, paternal grandparents, and maternal grandfather. If diligence is not found, need notice per Probate Code §1511.</li> </ol>
Cont. from 121615, 021716, 032316		
<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 type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> DSS Report		
<input checked="" type="checkbox"/> Clearances		
<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: skc
		Reviewed on: 4/28/16
		Updates:
		Recommendation:
		File 6 - Franklin

Probate Status Hearing RE: Receipt for Blocked Account

	<b>ANA MATILDE GONZALEZ</b> , was appointed Guardian of the Estate with \$100,000 to be placed into a Blocked Account on 03/23/2016.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Pursuant to Minute Order of 03/23/2016 need \$435 filing fee.
	Letters issued 03/23/2016.	
Cont. from	<b>Minute Order of 03/23/2016</b> set this Status Hearing re: Receipt for Blocked Account. Minute Order states: A blank receipt form is provided to Petitioner in open Court. The Court orders that upon receipt of the funds, the \$435 filing fee is to be paid.  <b>Receipt for Blocked Account</b> filed in the amount of \$100,140.09 on 05/02/2016.	
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: 04/29/2016 Updates: 05/03/2016 Recommendation: File 7- Gonzalez

**8A Justin Vaden Breitwieser (GUARD/P)**

**Case No. 15CEPR01203**

Petitioner: Monica Letitia Rocha (pro per)

Petitioner: Jarod Edward Rocha (pro per)

Petitioner: Twyla G. Klein (pro per)

Objector: Soliel Phariss (pro per)

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

		<b><u>TEMPORARY EXPIRES ON 5/4/16</u></b>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 3/30/16. Minute order states</b> the Court orders that Soliel Phariss, mother, is not to reside in the Rocha's home. The Rocha's are to obtain counseling for the minor with a child psychiatrist (PhD) and bring paper proof of appointments on 5/4/16 based on the parties reporting that the minor has become overly emotional about visiting Twyla Klein. The Court orders that Twyla can still have visitation but it must be supervised by either Monica Rocha or Jarod Rocha. Said visitation for Twyla shall be every Monday and Thursday from 11am to 1pm at the McDonalds on Herndon and Ingram, beginning 3/31/16. The Court orders that there is to be no discussion of this matter, nor any disparaging comments about the other parties made, in front of or to the minor. An additional responses must be filed and properly served by 4/20/16.</p> <p>1. Need Declaration Under Uniform Child Custody Jurisdiction and Enforcement Act (UCCJEA).</p>
		<p><b>MONICA LETITIA ROCHA</b>, maternal grandmother, <b>JEROD EDWARD ROCHA</b>, maternal step-grandfather and <b>TWYLA G. KLEIN</b>, paternal great-grandmother, are petitioners.</p>	
Cont. from 021716, 033016		Please see petition for details.	
	Aff.Sub.Wit.	<b>Objections of mother, Soliel Phariss, filed on 3/30/16</b>	
✓	Verified	<b>Court Investigator Report filed on 3/23/16</b>	
	Inventory	<b>Declaration of Twyla G. Klein filed on 3/24/16</b>	
	PTC	<b>Declaration of Twyla G. Klein filed on 4/11/16</b>	
	Not.Cred.	<b>Declaration of Kenneth A. Klein filed on 4/11/16</b>	
✓	Notice of Hrg	<b>Declaration of father, Justin Breitwieser filed on 4/11/16</b>	
✓	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	X	
	Citation		
	FTB Notice		
		<b>Reviewed by: KT</b>	
		<b>Reviewed on: 4/28/16</b>	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 8A - Breitwieser</b>	



**Petition for Visitation**

		<p><b>MONICA LETITIA ROCHA</b>, maternal grandmother, is petitioner.</p> <p>Please see petition for details.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
<p><b>Cont. from 021716, 033016</b></p>			
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
	<b>Notice of Hrg</b>		
	<b>Aff.Mail</b>		
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
			<p><b>Reviewed by: KT</b></p>
			<p><b>Reviewed on: 5/3/16</b></p>
			<p><b>Updates:</b></p>
			<p><b>Recommendation:</b></p>
			<p><b>File 8C - Breitwieser</b></p>

Petitioner: Twyla G. Klein (pro per)

Petition for Visitation

		<p>TWYLA G. KLEIN, paternal great-grandmother, is petitioner.</p> <p>Please see petition for details.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
<p>Cont. from 021716, 033016</p>			
	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		
			<p>Reviewed by: KT</p>
			<p>Reviewed on: 5/3/16</p>
			<p>Updates:</p>
			<p>Recommendation:</p>
			<p>File 8D - Breitwieser</p>

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

	See Petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>Minute Order 3/23/16:</b> Examiner notes provided in open court. The Court grants temporary orders; Letters are to issue forthwith. Petitioner is to make further attempts at service.
		As of 4/28/16, the following issue remains noted:
		1. Petitioner filed declarations of due diligence for the mother and the maternal grandfather on 3/8/16 and further diligence on 4/20/16.
		If diligence is not found, need personal service on the mother, and service on the maternal grandfather, of Notice of Hearing and proof of service at least 15 days prior to the hearing per Probate Code §1511.
Cont. from 021616, 032316		
<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 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		
		<b>Reviewed by:</b> JF/skc
		<b>Reviewed on:</b> 4/28/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		File 9- Villanueva

Order to Show Cause

	<p><b>SCOTT A. MURPHY</b> and <b>DAWN R. MURPHY</b>, parents, were appointed Co-Guardians of the Estate, with all funds to be placed in a blocked account on 03/01/2016.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need Receipt for Blocked Account.</p>
	<p>Letters issued 03/02/2016</p>	
Cont. from		
Aff.Sub.Wit.		
Verified	<p><b>Minute Order of 03/23/2016</b> set this Order to Show Cause.</p>	
Inventory	<p><b>Minute Order states:</b> No Appearances – The Court issues an Order to Show Cause to Gary Bagdasarian as to why he should not be sanctioned for his failure to appear and as to Scott and Dawn Murphy as to why they should not be removed as Guardians of the Estate for failure to file the Receipt for Blocked Account. Mr. Bagdasarian, Scott Murphy, and Dawn Murphy are each ordered to be personally present in court or present via CourtCall on 05/04/2016.</p>	
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	<p><b>Status Report and Ex Parte Application for Order Authorizing Guardians to Take Possession of Death Benefit on Behalf of Minor Beneficiary filed 04/28/2016</b> states although the Co-Guardian's attorney failed to remind them of the Status Hearing on 03/23/2016 concerning the receipt for the blocked account, they understand that, notwithstanding the fact that their attorney did not notify them of said hearing date and did not appear, co-guardians state it is their obligation to appear at all scheduled hearings and provide documentation required by the Court whether or not their Attorney notifies them. They apologize for not making the appearance on 03/23/2016 and ask that they remain as co-guardians of the estate.</p>	
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
✓ Order	<p>The only asset of the guardianship of the estate will be proceeds from the Transamerica individual Annuity No. TAR0065416. They have completed and filed the Legacy Non-Spouse Individual Annuity Claimant's statement in connection with same and are awaiting the proceeds for deposit into a blocked account.</p>	
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p><b>Please see additional page</b></p>	<p><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 04/29/2016</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 10- Murphy</b></p>

The minor is a 100% beneficiary. The order Appointing Guardian of Minor filed 03/01/2016 indicates at paragraph 9d that the Co-Guardians are not authorized to take possession of money or any property without a specific Court order. Transamerica Life Insurance Company requires a specific order authorizing the co-guardians to take possession of the death benefits received on behalf of the minor before they will release the funds to the undersigned co-guardians. In addition, co-guardians do not have a specific dollar amount that will be distributed, they intend to deposit all funds received into a blocked account at Educational Employees Credit Union located at 1660 Herndon Ave., Clovis, Ca. 93611.

Consequently, the co-guardians would request for an order authorizing them to take possession of the death benefit payable on behalf of the minor. It is further requested an Order to Deposit Money Into Blocked Account at Educational Employees Credit Union. Co-Guardians also request a continuance of the state of the filing in the blocked account of 60 days to allow them to receive the proceeds.

Amended Petition for Probate of Will and for Letters Testamentary with IAEA

<b>DOD: 12/27/2015</b>		<p><b>PAUL LAWRENCE DAVIS,</b> brother/named executor without bond, is petitioner.</p> <p>All heirs waive bond.</p> <p>Petitioner is a resident of West Allis, Wisconsin.</p> <p>Full IAEA – o.k.</p> <p>Will dated 8/27/1980</p> <p>Residence: Fresno Publication: Fresno Business Journal</p> <p><b>Estimated value of Estate:</b>                      Personal property           \$ 5,000.00                      Annual gross income:       \$       0.00                      Real property:                 \$ 75,000.00  <b>Total:                           \$ 80,000.00</b></p> <p><b>Probate Referee: Rick Smith</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Waivers of bond were filed 3/29/16 by Kim Fromm-Evans and Mardelle Fromm. However, they are not on the Judicial Council mandatory use forms (DE-142).</p> <p>2. Proposed personal representative is a resident of Wisconsin. 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><b>Note:</b> If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> <li>• <b>Tuesday, October 4, 2016</b> for filing Inventory and Appraisal</li> <li>• <b>Tuesday, August 8, 2017</b> for filing the first account or petition for final distribution</li> </ul>
<b>Cont. from 032316</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b> s/p		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> w/		
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		<p><b>Reviewed by:</b> SEF</p> <p><b>Reviewed on:</b> 4/29/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 11 - Davis</b></p>	

Amended Petition for Letters of Administration and Authorization to Administer Under IAEA

DOD: 9/1/2015	DAMON C. GARY, son, is petitioner and requests appointment as administrator without bond		<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note:</b> If granted, the Court will set status hearings as follows: <ul style="list-style-type: none"> <li>• <b>Tuesday, October 4, 2016</b> for filing Inventory and Appraisal</li> <li>• <b>Tuesday, August 8, 2017</b> for filing the first account or petition for final distribution</li> </ul>	
	Sole heir waives bond			
Cont. from	Full IAEA – o.k.			
<input type="checkbox"/> Aff.Sub.Wit.	Decedent died intestate			
<input checked="" type="checkbox"/> Verified	Residence: Fresno			
<input type="checkbox"/> Inventory	Publication: Business Journal			
<input type="checkbox"/> PTC				
<input type="checkbox"/> Not.Cred.				
<input type="checkbox"/> Notice of Hrg	<b>Estimated value of Estate:</b> Personal property           \$   16,400.00 Annual gross income:       \$       0.00 Real property:               \$  92,834.00 <b>Total:                           \$  109,234.00</b>			
<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		Probate Referee: Steven Diebert		
<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: SEF
				Reviewed on: 4/28/16
			Updates:	
			Recommendation: SUBMITTED	
			File 12 - Goodstein	

Ex Parte Petition for Appointment of Guardian Ad Litem

		<p><b>ALLIANCE UNITED INSURANCE GROUP</b> is Petitioner and requests appointment of <b>MARIDAUN DEFOREST</b>, Parent, as Guardian ad Litem to represent the interests of <b>STEVIE UNDERWOOD</b>, a person with a disability within the meaning of Probate Code §3603.</p> <p>See petition for details.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><u>CONTINUED TO 5/26/16</u></b> Per attorney request</p> <p><b>Minute Order 3/30/16:</b> Counsel requests a continuance to address the defects.</p> <p><b>Note:</b> This petition was filed ex parte on 2/18/16. On 3/9/16, the Court ordered the ex parte petition set for hearing on 3/30/16 with 15 days' notice to interested parties. Order setting hearing was mailed to Attorney Berger on 3/10/16.</p> <p>As of 4/28/16, nothing further has been filed. The following issues remain noted:</p> <ol style="list-style-type: none"> <li>1. A person may not act as a guardian ad litem unless he or she is an attorney or is represented by an attorney. See NOTE at caption of the petition.</li> <li>2. Need proof of service of Notice of Hearing on this Petition for Appointment of Guardian ad Litem at least 15 days prior to the hearing per Order of 3/9/16, including: <ul style="list-style-type: none"> <li>- Stevie Underwood</li> <li>- Maridaun Forest</li> <li>- Other interested parties/agencies</li> </ul> </li> </ol>	
Cont. from 033016				
<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.			
<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: 4/28/16		
		Updates:		
		Recommendation:		
		File 13A- Underwood		

Petition for Order Establishing Special Needs Trust

			<p>STEVIE UNDERWOOD, by and through her Guardian ad Litem <b>MARIDAUN DEFOREST</b>, is Petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><b><u>CONTINUED TO 5/26/16</u></b> Per attorney request</p> <p><u>Note:</u> Ms. DeForest's standing as GAL is contingent on her appointment pursuant to the petition at Page A.</p> <p><u>Minute Order 3/30/16:</u> Counsel requests a continuance to address the defects.</p> <p>As of 4/28/16, nothing further has been filed. The following issues remain noted:</p> <p style="text-align: center;"><u>SEE PAGE 3</u></p>
<p>Cont. from 033016</p>				
	Aff.Sub.Wit.		<p>See petition for details.</p>	
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg	X		
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order	X		
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
				<p>Reviewed by: skc</p>
				<p>Reviewed on: 4/28/16</p>
				<p>Updates:</p>
				<p>Recommendation:</p>
				<p>File 13B- Underwood</p>

NEEDS/PROBLEMS/COMMENTS:

1. Notice of Hearing was served only on the agencies required at Probate Code §3602(f), but was not served on the proposed beneficiary, the proposed trustee, the proposed alternate trustee, or any other interested persons. Therefore need continuance for proper notice to the following:
  - Proposed beneficiary Stevie Underwood
  - Proposed trustee Maridaun DeForest
  - Proposed alternate trustee Neoala DeForest
  - Other remainder beneficiaries (see #2 below)

Note: The Court may require clarification regarding the named alternate trustee Neoala DeForest. How is this person related to the beneficiary?

Note: Although Maridaun DeForest is technically the petitioner herein, she is not represented by the filing attorney, who in fact represents the insurance agency that will be funding the trust based on a settlement with Ms. DeForest on Ms. Underwood's behalf. Therefore, despite Probate Code §1201 not requiring notice to self, it appears notice to Ms. DeForest is appropriate in this instance.

2. The trust at Article Six, provides that if the beneficiary leaves no spouse or issue, then her mother, Maridaun DeForest, is the remainder beneficiary. However, pursuant to intestate succession §6402(b), both parents would be her heirs. Therefore, need clarification regarding the omission of Stevie Underwood's father from this section. Notice of Hearing should also be given to the father as an interested person.
3. It is the policy of the Court to require Court approval for major purchases (over \$2,000.00), which after purchase become assets of the trust. See Local Rule 7.19.B. It appears this language should be added to Article Three. Need revised proposed trust.
4. The trust should include a "Schedule A" which lists the assets that will fund the special needs trust. See Local Rule 7.19.A.

Note: Given the proposed value (\$13,500.00), the Court may require further information regarding Petitioner's plans for use of the funds. Does Petitioner intend to make one or a few large purchases, such as a vehicle or a residence (per Article Seven, Section 5), or does Petitioner intend to maintain the funds in the trust for smaller special needs of the beneficiary?

5. Petitioner requests bond be waived pursuant to Probate Code §§ 2323, 2628 given the value of the trust (See Article Eight, Section 1; Cal. Rule of Court 7.903(d); however, it is the policy of the Court to require blocked account in lieu of bond. Therefore, if bond of \$14,850.00 is not required pursuant to Cal. Rules of Court 7.903(c), 7.207, Probate Code §2320(c), need Order to Deposit Money Into Blocked Account (MC-355), and the Court will set a status hearing for the filing of the receipt (MC-356).

SEE ADDITIONAL PAGES

NEEDS/PROBLEMS/COMMENTS (Cont'd):

6. Petitioner requests the Court waive accountings (See Article Eight, Section 4) pursuant to Cal. Rule of Court 7.903(d), given the value of the trust; however, it is the policy of the Court to require at least a first account pursuant to Probate Code §2620(a) prior to waiver of *further* accounts. See Local Rule 7.8 re blocked accounts. If a first account is required, the Court may set a status hearing for its filing.
7. Need order. Local Rule 7.1.1.F.

Note: If granted, the Court may set status hearings as follows:

- Wednesday, June 15, 2016 for the filing of bond of \$14,850.00 or receipt for blocked account (MC-356), as required.
- Wednesday, July 5, 2017 for the filing of the first account, if required.

If the proper items are on file, status hearings may come off calendar. See Local Rule 7.5.

**Petition for Probate of Will and for Letters Testamentary and  
 Authorization to Administer under IAEA**

<b>DOD: 10/26/2015</b>	<b>JESUS MARTINEZ SALDANA</b> , son, is petitioner and requests appointment as Executor without bond	<b>NEEDS/PROBLEMS/COMMENTS:</b>  3. The petition lists decedent's will dated 9/10/2010. However, the Order requests the will dated 9/28/2010 be admitted to probate and the copy of will attached to the petition is dated 9/28/2010. Need clarification.  4. Petitioner signed <i>Letters</i> , but did not check affirmation box at item 2. Need new <i>Letters</i> .  <b>Note:</b> If granted, the Court will set status hearings as follows: <ul style="list-style-type: none"> <li>• <b>Tuesday, October 4, 2016</b> for filing Inventory and Appraisal</li> <li>• <b>Tuesday, August 8, 2017</b> for filing the first account or petition for final distribution</li> </ul>
	Full IAEA – o.k.	
	Will dated 9/10/2010 – (see note 1)	
<b>Cont. from</b>	Residence: Fresno Publication: Business Journal	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b> <small>s/p</small>		
<input checked="" type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>	<b>Estimated value of Estate:</b> Personal property \$ 0.00 Annual gross income: \$ 0.00 Real property: \$ 251,000.00 <b>Total: \$ 251,000.00</b>	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> <small>w/</small>		
<input checked="" type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>	<b>Probate Referee: Steven Diebert</b>	
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b> <small>x</small>		
<input checked="" type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed on:</b> 4/29/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 14- Martinez</b>

**15 Kenneth Warren Cumbie (Estate) Case No. 16CEPR00316**

**Attorney Shekoyan, James E. (for Kenneth Karl Cumbie – Petitioner – Son)**

**Petition for Probate of Will and for Letters Testamentary with IAEA**

<b>DOD: 06/28/2015</b>	<b>KENNETH KARL CUMBIE</b> , son/named Executor without bond, is petitioner.		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need original will to be deposited with the Court pursuant to Probate Code §8200(a)(1).</p> <p><b>Note: If the petition is granted status hearings will be set as follows:</b></p> <ul style="list-style-type: none"> <li>• <b>Wednesday, 10/05/2016 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <b>and</b></li> <li>• <b>Wednesday, 07/05/2017 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.</li> </ul> <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>									
	Full IAEA – o.k.											
	Will dated: 03/04/2006											
<b>Cont. from</b>	Residence: Clovis											
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Publication: The Business Journal											
<input checked="" type="checkbox"/> <b>Verified</b>												
<input type="checkbox"/> <b>Inventory</b>												
<input type="checkbox"/> <b>PTC</b>												
<input type="checkbox"/> <b>Not.Cred.</b>												
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	<p><b>Estimated value of the Estate:</b></p> <table> <tr> <td>Real property</td> <td>-</td> <td>\$650,000.00</td> </tr> <tr> <td>Less encumbrances</td> <td>-</td> <td>\$160,500.00</td> </tr> <tr> <td><b>Total</b></td> <td>-</td> <td><b>\$489,500.00</b></td> </tr> </table>			Real property	-	\$650,000.00	Less encumbrances	-	\$160,500.00	<b>Total</b>	-	<b>\$489,500.00</b>
Real property	-	\$650,000.00										
Less encumbrances	-	\$160,500.00										
<b>Total</b>	-	<b>\$489,500.00</b>										
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	w/	Probate Referee: Steven Diebert										
<input checked="" type="checkbox"/> <b>Aff.Pub.</b>												
<input type="checkbox"/> <b>Sp.Ntc.</b>												
<input type="checkbox"/> <b>Pers.Serv.</b>												
<input type="checkbox"/> <b>Conf. Screen</b>												
<input checked="" type="checkbox"/> <b>Letters</b>												
<input checked="" type="checkbox"/> <b>Duties/Supp</b>												
<input type="checkbox"/> <b>Objections</b>												
<input type="checkbox"/> <b>Video Receipt</b>												
<input type="checkbox"/> <b>CI Report</b>												
<input type="checkbox"/> <b>9202</b>												
<input checked="" type="checkbox"/> <b>Order</b>												
<input type="checkbox"/> <b>Aff. Posting</b>												
<input type="checkbox"/> <b>Status Rpt</b>												
<input type="checkbox"/> <b>UCCJEA</b>												
<input type="checkbox"/> <b>Citation</b>												
<input type="checkbox"/> <b>FTB Notice</b>												
			<b>Reviewed by:</b> LV									
			<b>Reviewed on:</b> 05/03/2016									
			<b>Updates:</b>									
			<b>Recommendation:</b>									
			<b>File 15- Cumbie</b>									

<b>DOD: 11/16/2013</b>	<b>VALERIE LYNN TAYLOR</b> , sister is petitioner and requests appointment as Administrator without bond.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Petition indicates decedent's residence at the time of death was Sanger, California, therefore the correct publication should be The Sanger Herald. Petitioner published in The Business Journal.</p> <p><b>Note: If the petition is granted status hearings will be set as follows:</b></p> <ul style="list-style-type: none"> <li>• <b>Wednesday, 10/05/2016 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <u>and</u></li> <li>• <b>Wednesday, 07/05/2017 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.</li> </ul> <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>
	Sole heir waives bond.	
<b>Cont. from</b>	Full IAEA – o.k.	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Decedent died intestate	
<input checked="" type="checkbox"/> <b>Verified</b>	Residence: Sanger	
<input type="checkbox"/> <b>Inventory</b>	Publication: The Business Journal	
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>	<b>Estimated value of the Estate:</b>	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Personal property - \$417,000.00	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> w/	Probate Referee: Steven Diebert	
<input checked="" type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>		
<input checked="" type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed on:</b> 05/03/2016
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 16- Taylor</b>



Petition for Probate of Will and for Letters Testamentary; Authorization to Administer under IAEA

<b>DOD: 3/14/16</b>		<p><b>DAN CHARLES GILBERT</b>, Son and Named Alternate Executor without bond, is Petitioner.</p> <p>Full IAEA – ok</p> <p>Will dated 7/27/09</p> <p>Residence: Fresno Publication: Business Journal</p> <p>Estimated value of estate: Real property: \$500,000.00</p> <p>Probate Referee: Rick Smith</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Note:</u> The Court will set status hearings as follows:</p> <ul style="list-style-type: none"> <li>• Wednesday Oct. 5, 2016 for filing Inventory and Appraisal</li> <li>• Wednesday July 5 2017 for filing the first account or petition for final distribution</li> </ul>
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b> S/P		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> w		
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 4/28/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b> SUBMITTED</p> <p><b>File 18- Gilbert</b></p>	

Petitioner: Alma Meza (Pro per)

Petitioner: Lucila Martinez (Pro per)

Petition for Appointment of Probate Conservator of the Person

		<b>NO TEMPORARY REQUESTED</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>LUCILA MARTINEZ and ALMA MEZA</b> , half-sister and niece, are petitioners and request appointment as co-conservators of the person	1. Declaration of due diligence was filed as to Rosa De Loya (mother). If court does not excuse notice, need proof of mailed service 15 days before the hearing of the <i>Notice of Hearing</i> with copy of petition on Rosa De Loya.
<b>Cont. from</b>		<b>Court Investigator report filed 4/27/16.</b>	2. Proof of mailed service of <i>Notice of Hearing</i> filed 4/4/16 shows that Manuel Martinez (half sibling) was noticed at:  6148 Heliotrope Avenue, <u>Hollywood</u> CA 90270  However, his address in listed in the petition as:  6148 Heliotrope Avenue, <u>Maywood</u> CA 90270.
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	<i>See petition for details.</i>	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	w/	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input checked="" type="checkbox"/>	<b>Pers.Serv.</b>	w/	
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input checked="" type="checkbox"/>	<b>Video Receipt</b>		
<input checked="" type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input checked="" type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> SEF
			<b>Reviewed on:</b> 4/29/16
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 19- Martinez</b>

Petition for Appointment of Probate Conservator of the Person

See petition for details.			<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Court Investigator advised rights on 4/11/16</p> <p>Voting rights affected – need minute order.</p> <p>1. The Capacity Declaration is incomplete at #7 re ability to consent to medical treatment – 7b is checked, but the doctor did not initial in the necessary space.</p> <p>2. Need video receipt per Local Rule 7.15.8.A.</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	X	
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 4/29/16
			Updates:
			Recommendation:
			File 20- Flores

**21 Reann Maldonado (CONS/P)**

**Case No. 16CEPR00349**

Petitioner: Christina Apolonia Maldonado (pro per)

Petitioner: James Edward Alvarado (pro per)

**Petition for Appointment of Probate Conservator**

		<b>THERE IS NO TEMPORARY. No temporary was requested.</b>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Court Investigator Advised Rights on 4/13/16.</b></p> <p><b>Voting Rights affected need Minute Order.</b></p> <ol style="list-style-type: none"> <li>1. Dr. Neepa Ved's signature on the Capacity Declaration is not dated.</li> <li>2. Need Conservatorship Video Viewing Receipt for both petitioners.</li> </ol>
		<p><b>CHRISTINA MALDONADO</b>, mother and <b>JAMES ALVARADO</b>, cousin, are petitioners</p> <p>Please see petition for details.</p> <p><b>Court Investigator Report filed on 4/26/16</b></p>	
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W/	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>	X	
<input checked="" type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input checked="" type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<p><b>Reviewed by:</b> KT</p> <p><b>Reviewed on:</b> 4/29/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 21- Maldonado</b></p>



**Probate Status Hearing RE: Filing of an Inventory and Appraisal and Filing of a First or Final Account**

<b>DOD: 3/4/1994</b>	<b>TERRY TUCKER</b> was appointed as Executor with full IAEA and without bond on 1/17/1995.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Status Report was not served on all necessary parties. Local Rule 7.5B.
	Letters issued on 1/17/1995.	
	Inventory and Appraisal was due June 1995.	
<b>Cont. from 042016</b>	Creditor's claim filed on 2/14/1995 by Stephens & Bean Chapel in the amount of \$1,160.11.	
<b>Aff.Sub.Wit.</b>	First account or petition for final distribution was due March 1996.	
<b>Verified</b>	<b>Minute Order dated 1/20/16</b> states the Court orders Terry Tucker removed as Executor and appoints the Public Administrator. Mr. Tucker reports that the home was lost to foreclosure in 1996, but there are vehicles and a business.	
<b>Inventory</b>		
<b>PTC</b>	Letters for the Public Administrator issued on 4/22/16	
<b>Not.Cred.</b>	<b>Status Report filed on 4/14/16 states</b> the Court appointed the Public Administrator as Successor Administrator. This matter was assigned to Deputy Public Administrator Scott Stacy. He reports the following information:	
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>	He talked to him on the phone approximately four times, one of which while he was in the hospital. He arranged for him to come to the Public Administrator's Office about three weeks ago, but he did not show up and he has not been able to contact him since. He has left a couple of messages for him. He has not be able to get him to turn over anything that he did regarding the estate prior to his removal. He doesn't know what assets there may be in the estate due to the former administrator's lack of cooperation.	
<b>Aff.Pub.</b>	The Public Administrator does not have any information with which to file an Inventory and Appraisal or final account.	
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: KT</b> <b>Reviewed on: 4/28/16</b> <b>Updates:</b> <b>Recommendation:</b> <b>File 23- Tucker</b>

Petition for Appointment of Temporary Guardian of the Person

See petition for details.			<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. 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) <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Alfredo Romero (Father)</p>
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	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: 4/29/16
			Updates:
			Recommendation:
			File 24- Romero

