



## 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.



**Amended Petition for Approval of Second and Final Account and Report of Conservator of the Person and Estate; Request for Payment of Conservator's Attorney; Request of Authorization to Distribute Assets to Administrator of the Estate and Named Beneficiaries; and Discharge Conservator of the Estate. Probate Code 2620**

<b>DOD: 1/1/14</b>		<b>CRAIG MACGLASHAN</b> , Conservator, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Account period: 6/1/11 – 1/1/14	<ol style="list-style-type: none"> <li>Billing statement for the First and Final Account listed the paralegal rate at \$60.00 per hour. This amended petition lists the paralegal rate at \$100.00 for the same billing period. This amounts to a difference of \$1,052.00 in fees. Need clarification.</li> <li>Prior billing statement did not include a charge for the attorney in the amount of \$84.00 on 9/17/12 however it is listed in the billing statement attached to the amended account. Need clarification.</li> <li>Prior billing statement had the paralegal preparing the order (\$24.00 charged) on 12/31/14. The billing statement attached to the amended account shows the attorney preparing the order (\$112.00 charged). Need clarification.</li> </ol>
<b>Cont. from 040715</b>		Accounting - <b>\$2,037,282.39</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Beginning POH - <b>\$1,661,989.40</b>	
<input checked="" type="checkbox"/>	<b>Verified</b>	Ending POH - <b>\$1,589,045.76</b>	
<input type="checkbox"/>	<b>Inventory</b>	Conservator - <b>waives</b>	
<input type="checkbox"/>	<b>PTC</b>	Attorney - <b>\$13,352.00</b>	
<input type="checkbox"/>	<b>Not.Cred.</b>	(65.30 hours of paralegal and attorney time at \$100 - \$280 per hour.)	
<input type="checkbox"/>	<b>Notice of Hrg</b>	Costs - <b>\$435.00</b> (filing fee)	
<input type="checkbox"/>	<b>Aff.Mail</b>	N/A	
<input type="checkbox"/>	<b>Aff.Pub.</b>	Petitioner states the conservatee died on 1/1/14. Petitioner has been appointed as executor of the estate of Jamie McGlashan.	
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>	<b>Petitioner prays for an Order:</b>	
<input type="checkbox"/>	<b>Objections</b>	<ol style="list-style-type: none"> <li>Approving, allowing and settling the second and final account and report of conservator;</li> <li>All acts and transactions of Conservator as set forth in the accounting are ratified, confirmed and approved;</li> <li>Authorizing the payment of attorney fees and costs;</li> <li>Transfer of the remaining property on hand to Craig MacGlashan as executor of the estate of Jamin McGlashan and to Craig MacGlashan as joint owner of the Farmers Insurance Group Federal Credit Union Account.</li> </ol>	
<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: KT</b>
			<b>Reviewed on: 4/30/15</b>
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 2 - McGlashan</b>



<b>DOD: 2-16-09</b>	<p><b>GREGORY L. TAYLOR</b> was appointed Administrator with Will Annexed with Limited IAEA without bond on 1-23-14. Letters issued 2-3-14. This status hearing for the filing of the first account or petition for final distribution was set at the hearing on 1-23-14.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
		<p><b>Note: Memorandum of Costs totaling \$27,315.38 was filed 4/20/15. Please see Page 2.</b></p>
Aff.Sub.Wit.	<p><b>The Administrator's First and Final Account was filed 6-5-14. Objections were filed by Diane Elizabeth Taylor on 6-26-14.</b></p>	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	<p><b>Order Approving First and Final Report of Administrator filed 7-11-14</b> ordered that the estate be brought to a close except for the matters of the Objector's to be filed petition for attorneys' fees and costs required to have the 2006 codicil admitted to probate, surcharge of the Objector, and responsive pleadings thereto. The Minute Order of 7-11-14 also set the matter for Settlement Conference/Court Trial.</p>	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp	<p><b>Status Report filed 3-10-15 states: The Order of 7-11-14 approved the account, reserving \$15,000.00 of the corpus and \$10,000.00 of Ms. Taylor's share to be held in the blocked account.</b> The order provided for statutory and extraordinary fees to the Administrator's attorney and distribution except for the reserved amounts. The Court directed Administrator's attorney to file a petition to surcharge the Objector's share. The Order for Withdrawal of Funds for pro rata distribution and attorneys' fees was filed 7-23-14.</p>	
Objections		
Video Receipt		
CI Report		
9202		
Order	<p><b>Administrator filed a Petition for Surcharge of Objector Diane Taylor's Testate Share of the Estate on 8-8-14 and the matter was confirmed for trial.</b> Objector Diane Taylor filed a Petition to Approve Attorney's Fees and Costs on 8-15-14. Objection and replies were timely filed.</p>	<p><b>Reviewed by:</b> skc</p>
Aff. Posting		<p><b>Reviewed on:</b> 4/30/15</p>
Status Rpt		<p><b>Updates:</b></p>
UCCJEA		<p><b>Recommendation:</b></p>
Citation	<p><b>On 11-4-14, after reviewing Judge Oliver's Order of Final Distribution signed 7-11-14, the Court found that the ONLY issue remaining was for Objector to file a memorandum of her costs.</b> Attorney McCloskey, on behalf of the estate, filed his request to surcharge such fees, along with a declaration. The Court could find nowhere in the order where further evidence was to be admitted beyond what was noted above. Respondent agreed that there was no need for further evidence, and counsel for Objector did not provide any legal basis for an evidentiary hearing. As such, the Court ordered that no further evidence need be taken on this limited issue; the matter is returned to the Probate Court for a ruling on the attorney fee and cost issue.</p>	<p><b>File 3 - Taylor</b></p>
FTB Notice		
	<p><b>On 3-20-15, the Court admonished the parties to follow the previous orders of the Court and ordered Memorandum of Costs to be filed by 4/20/15.</b></p>	

**Memorandum of costs totaling \$27,315.38 includes:**

- \$2,280.00 in filing and motion fees
- \$307.71 for service of process
- \$75 witness fees
- \$23,011.50 attorney fees
- \$606.17 for Models, blowups, and photocopies of exhibits
- \$1,035.00 Court reporter fees

**Examiner notes the following for Court review:**

1. \$105.00 is noted for filing and motion fees with reference to a status report on 10/24/13; however, Court records do not reflect a payment of that amount on that date. Please note that runner fees are considered a cost of doing business and not reimbursable per Local Rule 7.17.B.
2. \$435.00 for filing this Memorandum of Costs is noted for filing and motion fees; however, this Memorandum of Costs was not charged a filing fee.

(Therefore, \$440.00 may be deducted from the \$2,280.00 in filing and motion fees.)

**Notice of Motion and Motion to be Relieved as Counsel**

<b>DOD: 6-12-07</b>	<b>CATHERINE A. AMADOR</b> , Attorney for Former Administrator <b>KIM MARIE GALLO</b> , is Petitioner.	<b>NEEDS/PROBLEMS/ COMMENTS:</b>
		<b>Note: On 1-7-15, the Court removed Kim Marie Gallo as Administrator and appointed the Public Administrator.</b>
<b>Cont. from 020415, 030315</b>	<b>Petitioner's Declaration in Support of Motion to be Relieved as Counsel states</b> she is an associate of Pascuzzi, Pascuzzi & Stoker, attorneys of record for Kim Marie Gallo, the duly appointed administrator of the estate. Ms. Amador prepared and filed the petition for appointment of Ms. Gallo as administrator of the estate of Pauline Sidam, who had been Ms. Gallo's mother-in-law. Ms. Gallo was appointed 9-11-13 and Letters issued. Ms. Gallo was given full IAEA powers.	<b>Note: On 3-3-15, the attorney was directed to address the following issues:</b>
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		<ol style="list-style-type: none"> <li>1. Petitioner filed "Proof of Service by First-Class Mail – Civil" Form POS-030 rather than the mandatory "Notice of Hearing – Probate" Form DE-120, which contains mandatory language regarding the hearing date and place pursuant to Probate Code §1211. The Court may require further service.</li> <li>2. According to the Declaration, the attorney was aware of the Administrator's removal of her residence from California to Minnesota, and her permanent address there, in March of 2014. However, no change of address was not filed with the Court or served on interested persons pursuant to Probate Code §8573 and Cal. Rule of Court 2.200. The Court may require clarification.</li> </ol>
<input checked="" type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>	The Inventory and Appraisal filed 10-4-13 consisted of a single asset, a single family residence in Fresno. Ms. Gallo exercised her IAEA authority and sold the house in April 2014.	
<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>	Prior to the sale, Ms. Gallo had informed Ms. Amador that she and her disabled son had decided to move to Minnesota to reside with her sister. She provided an address and stated that she could be reached at her current cell phone number.	
<input 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 type="checkbox"/> <b>Letters</b>		
<input 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>	Ms. Amador had provided Ms. Gallo with necessary documents and information to open an estate account to receive proceeds from the sale of the residence and instructions on how to handle the escrow in March 2014. Ms. Amador wrote to Ms. Gallo in April and May requesting information on the estate, and attempted to call, but the cell phone number had been disconnected. Ms. Amador wrote again in December following the status conference where she had been ordered to file the final report no later than 1-5-15, but no reply has been received.	
<input type="checkbox"/> <b>Aff. Posting</b>	To the best of Ms. Amador's knowledge, the address for Ms. Gallo in Minnesota is a valid address. None of the letters have been returned undeliverable. Even if she no longer resides there, it is expected that her sister would forward her mail.	
<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>	The attorney respectfully requests to be relieved as counsel of record for Ms. Gallo. She does not respond to efforts to contact her, and the attorney is unable to complete estate administration without her cooperation.	
		<b>Note: On 4-28-15, Ms. Amador filed a Notice of Change of Address for Kim Marie Gallo indicating an address in Brooklyn Park, Minnesota.</b>
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 4-30-15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 4 - Sidam</b>

Petitioner, Dale Stevens' First Partial Accounting

		<p><b>DALE STEVENS</b>, as the purported, proper, successor Trustee of the Edith Lillian Mitchell Stevens Revocable Trust, is petitioner.</p> <p><b>Petitioner states</b> Robert Stevens is indisputably the Trustee of the Sam C. Stevens Revocable Living Trust. Robert Stevens has produced and provided no discovery documents of any kind to present a more complete accounting. Dale Stevens has produced initially 269 pages of source documents, transaction receipts, paid utility statements, and similar source documents to Robert Stevens' attorney in accordance with the Court's most recent order in this case that the Parties engage in a mutual disclosure of documents.</p> <p>Therefore Dale Stevens can only provide this "partial" accounting because Robert Stevens is not observing the current Order of the Court nor administering the Sam C. Stevens Revocable Trust in accordance with the Code.</p> <p>The Petition for Instructions that initiated these proceedings asked for instructions and findings from the Court. The Court has yet to rule upon those three fundamental, foundational facts, which must be decided by Findings of the Court, before any actual attempt at reconciliation between the two Trusts can realistically be envisioned.</p> <p style="text-align: center;"><b>Please see additional page</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 4/14/15.</b></p> <ol style="list-style-type: none"> <li>1. The accounting does not comply with Probate Code §1060 et seq.</li> <li>2. Need Notice of Hearing.</li> <li>3. Need proof of service of the Notice of Hearing on all interested parties.</li> <li>4. Need Order.</li> </ol>	
<b>Conf. from 010515, 012715, 031715, 041415</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 type="checkbox"/>	<b>Notice of Hrg</b>			X
<input type="checkbox"/>	<b>Aff.Mail</b>			X
<input 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 type="checkbox"/>	<b>Letters</b>			
<input 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 type="checkbox"/>	<b>Order</b>	X		
<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: KT</b></p> <p><b>Reviewed on: 4/30/15</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 7A - Stevens</b></p>		

## **7A Edith Lillian Mitchell Stevens Rev. Liv. Trust Case No. 13CEPR00943**

The three fundamental issues (for which Instructions were sought by Petitioner) are set forth in the Petition for Instructions, as follows:

1. An adjudication, Finding, and Instruction from the Court that, under operation [the first paragraph of Section VIII] the Third Trust Amendment Dated February 11, 2008, Petitioner Clarence Dale Stevens is confirmed as the due, proper and only Successor Trustee of THE EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST dated November 2, 1983, as Amended on May 4, 2007, as additionally amended on May 9, 2007, and as further Amended on February 11, 2008.
2. An adjudication, Finding, and Instruction from the Court that the Third Trust Amendment of THE EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST dated November 2, 1983, as Amended on May 4, 2007, as additionally amended on May 9, 2007, and as further Amended on February 11, 2008 is in full force and effect.
3. An adjudication, Finding, and Instruction from the Court that the Third Trust Amendment of the THE EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST dated November 2, 1983, as amended, controls and instructs the Petitioner/Successor Trustee how the Trust Estate contained within THE EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST dated November 2, 1983, as Amended, shall be distributed.

Attached to the Petition is Restated Operating Summaries of all rents received and all debts and expenses paid by the Petitioner, for the years 2012, 2013 and partially into 2014 for the various Trust parcels of real property he has been administering since Edith Stevens died in 2012.

There can be no financial reconciliation between the two Trusts until the Court adjudicates the three foundational issues set forth above.

The Second Amendment to the Trust and the Third Amendment to the Trust changes the distributive shares of the beneficiaries.

Respondent Robert Stevens, submits that the Second and Third Amendments should be declared invalid so that the entire two Trust Estates can be divided equally among the four beneficiaries.

Petitioner Dale Stevens submits that both the Second and Third Trust Amendments should be declared valid and operative – and until that happens, the Parties cannot move forward to resolution of this matter.



Further, Edith executed so many different documents changing the terms of the Trust originally executed, that her intent for disposition of her estate is not clear. Edith also executed a Will, after all of the amendments, which has been purportedly denied by her in an alleged writing created by **CLARENCE DALE STEVENS** after staying with her son Larry. The Will purportedly divided her estate equally between her children again, as was originally contained in the Trust document.

The issue of the validity of any amendments executed by Edith is the primary focus of this proceeding, as well as the validity of a Will executed by Edith after the execution of the purported amendments.

On 11/11/14, the parties appeared for a Mandatory Settlement Conference. The conference was not held due to the fact that **CLARENCE DALE STEVENS** terminated the employment of his attorney Michael Karby and further because after the deposition of **CLARENCE DALE STEVENS** it was determined that additional discovery was necessary. **CLARENCE DALE STEVENS** was given an additional 60 days to obtain new counsel. A hearing was set for status on 1/27/15.

**CLARENCE DALE STEVENS** has not obtained new legal counsel. **CLARENCE DALE STEVENS** is precluded from acting as his own attorney as he is acting as the Trustee of the **EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST** and claims to be the valid Trustee pursuant to a third amendment to the Trust, executed at a time when **CLARENCE DALE STEVENS** was care giving for Edith and she was suffering dementia.

Objector/Beneficiary, **ROBERT STEVENS** is prepared and ready for trial in this matter. **ROBERT STEVENS** has made several proposals for settlement in this matter, none of which have been agreed to by **CLARENCE DALE STEVENS**.

Accountings have been filed, however, neither party is in a position to prepare full accountings, until there is a determination as to who is the proper Trustee of the **EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST**.

The matter of the validity of the Trust documents and/or her Will needs to be resolved before any further action in this proceeding can occur.

**ROBERT STEVENS** request this matter be set for trial, with the issue of the validity of the Trust and/or Will of **EDITH LILLIAN MITCHELL STEVENS** being bifurcated from any other issues.

This matter is completely stalled however, as long as **CLARENCE DALE STEVENS** is not represented by legal counsel.

**Probate Status Hearing RE: Repairs to the Two Properties**

	There is a dispute between <b>Dale Stevens</b> and <b>Robert Stevens</b> as to the validity of amendments to the Trust. Please see pages 15A and 15B.	<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <p><b>Continued from 4/14/15. Minute order states Ms. Standard represents that the Mariposa property is not "red tagged: but the property is being worked on without a permit. The Court orders that no work is to be done without proper permits.</b></p> <p>1. <b>Need current written status report.</b> 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>
<b>Cont. from 041415</b>		
<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>Minute order dated 3/17/15 set this status hearing re: Repairs to the Two Properties.</b> Ms. Standard is to file a Status Report at least two court days prior to 4/14/15. The Court wants written proof of Kingsburg City's commitment to not act on the 940 Mariposa property.</p> <p><b>Former Status Report of Donna Standard, Attorney for Robert Stevens, filed on 4/10/15</b> states she has been in touch with Michael Nowlin, City Attorney for the City of Kingsburg, and he once again confirmed the forbearance until this matter is resolved, however he was unsure if any action had been taken and he is in the process of trying to contact the City Manager who will not be available until Monday, April 13.</p> <p>The property was red tagged back in January and to the knowledge of Mr. Robert Stevens and Ms. Standard no further action was necessary until this matter was resolved. Mr. Nowlin was not inclined to provide a letter to this effect until he can confirm with the City Manager that nothing else has occurred on the property.</p> <p>IF Dale Stevens desires to make repairs, Robert Stevens is more than willing to cooperate with said repairs. Dale Stevens has been collecting all the rents on the property prior to the red tag date.</p> <p>This matter needs to be set for trial so that it can be determined who is the proper trustee of the Edith Lillian Mitchell Stevens Trust, however, the property is owned by both trusts and at a minimum, one-half of all rents collected should have been paid to the Robert Stevens Estate.</p>	
		<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 4/30/15</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 7C - Stevens</b></p>

	<b>CYNTHIA C. THOMAS and PAMELA J. THOMAS</b> , daughters, were appointed Co-Conservators of the Person and Estate with bond of \$\$65,709.60 on 1-29-14. Bond was filed and Letters issued on 2-6-14.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note: On 4-22-15, Attorney Kenton J. Klassen of Dowling Aaron Incorporated filed Notice of Motion and Motion to be Relieved as Counsel, which is set for hearing 6-2-15.</b></p> <p><b>1. Need first account pursuant to Probate Code §2620 or written status report pursuant to local rules.</b></p>
<b>Cont from 040315</b>	At the hearing on 1-29-14, the Court set this status hearing for the filing of the first account.	
<b>Aff.Sub.Wit.</b>	<p><b>Status Declaration of Jared C. Marshall filed 4-2-15 states</b> his firm prepared the first account current and report of Co-Conservators, which was executed by the Co-Conservators on or around 3-3-15. Unfortunately, due to unforeseen circumstances, his firm has requested to withdraw as counsel of record for the Co-Conservators. These same circumstances, and his duties as officer of the court, preclude him from filing the existing first account current and report of the Co-Conservators on their behalf.</p> <p>A substitution of attorney was mailed to the Co-Conservators on 3-24-15, but has not yet been returned. Absent the return of the signed form or a material change in the existing circumstances, the firm intends to file a petition to withdraw as counsel of record and will file for attorney's fees separately.</p> <p>Mr. Marshall respectfully requests a continuance of 30 days to finalize withdrawal as counsel and to allow the Co-Conservators time to retain other counsel or otherwise finalize their first account in pro per.</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>		
		<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 4-30-15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 8 - Coyle</b></p>

Attorney Ruiz, Richard A. (for Rose Hess – Petitioner)  
 Mother Weikel, Jennifer  
 Father Phillips, Robert

Status Hearing Re: Court Trial

	ROSE HESS, Paternal Great-Grandmother, filed Petition for Appointment of Guardian of Minor on 4/15/14, and was appointed Temporary Guardian ex parte on 4/15/14.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  Continued from 4/21/15  <b>Note: On 3/27/15, Ms. Hess filed a new temporary guardianship petition, which was heard on 4/7/15 and continued to 5/5/15. See Page B.</b>
<b>Cont. from 042115</b>		
Aff.Sub.Wit.	JENNIFER WEIKEL, Mother, filed an objection on 4/25/14.	
Verified		
Inventory	ROBERT PHILLIPS, Father, filed an objection on 4/30/14, but later signed a consent and waiver of notice, which was filed 7/18/14.	
PTC		
Not.Cred.		
Notice of Hrg	At hearing on the temporary guardianship petition on 5/1/14, the matter was set for Court Trial. Ms. Hess' temporary guardianship letters were extended at further hearings.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	On 9/26/14, the Court terminated the temporary guardianship, made various orders, including visitation orders for Ms. Hess, and the matter was set for Court Trial on 11/18/14.	
Conf. Screen		
Letters		
Duties/Supp	At the continued Court Trial on 3/24/15, the Court set status hearing re reconsideration of temporary orders for 4/7/15 and also set this hearing for status re trial.	
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 4/30/15
		Updates:
		Recommendation:
		File 9 - Phillips

**9B Phillips, Paris (GUARD/P)**

**Case No. 14CPER00351**

**Atty Ruiz, Richard A. (for Rose Hess – Paternal Great-Grandmother – Petitioner)**

**Atty Phillips, Robert (Pro Per – Father)**

**Atty Weikel, Jennifer (Pro Per – Mother – Objector)**

**Petition for Appointment of Temporary Guardian**

		See petition for details.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Note:</u> Ms. Hess' original petition for guardianship filed 4/15/14 remains outstanding. The most recent visitation order is set forth in Order After Hearing filed 10/17/14.</p> <p>The following issue remains noted for reference:</p> <ol style="list-style-type: none"> <li>Although Robert D. Phillips (Father) signed consent and waived notice in connection with ongoing proceedings and trial, the Court may require personal service regarding this <u>new</u> temporary petition pursuant to Probate Code §2250(e).</li> </ol>
<b>Cont. from 040715</b>			
<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> 4/30/14</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 27B - Phillips</b></p>	



**Order to Show Cause**

<b>DOD: 6/15/14</b>	<b>ABIGAIL SERRATO</b> , Daughter, was appointed Executor with Full IAEA without bond on 12/9/14. Letters issued 12/10/14.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>1. Need Inventory and Appraisal pursuant to Probate Code §8800 or written status report pursuant to Local Rule 7.5.</b></p>
	At the hearing on 12/9/14, the Court set status hearing for the filing of the Inventory and Appraisal for 4/7/15.	
	On 4/7/15, there were no appearances. The Court set this Order to Show Cause to Franz Criego and Abigail Serrateo as to why they should not be sanctioned for failure to appear and failure to file the Inventory and Appraisal. Mr. Criego and Ms. Serrato are ordered to be personally present in court on 5/12/15. The Court will also consider whether or not Ms. Serrato should be removed as Executor.	
	Minute Order of 4/7/15 was mailed to Mr. Criego and Ms. Serrato on 4/7/15.	
<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>		
<input checked="" type="checkbox"/> <b>Letters</b>   12/10/14		
<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> 4/30/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 15 - Serrato</b>

**13 Rose Rodriguez (CONS/PE)**  
**Atty Krbechek, Randolf (for Dennis Rodriguez)**  
**Atty McFarland, Pamela J (for Petitioner Maxine Rodriguez)**  
**Atty Knudson, David N. (court appointed for Conservatee)**

**Case No. 14CEPR00994**

**First Amended Petition for Appointment of Probate Conservator of the Person & Estate**

		<b>TEMPORARY OF THE PERSON ONLY EXPIRES 5/5/15</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Court Investigator advised rights on 12/18/14.</b>  <b>Voting rights affected need minute order.</b>  1. Capacity Declaration filed on 3/24/15 is incomplete. It does not state the name of the proposed conservatee at #4.
		<b>MAXINE RODRIGUEZ, daughter, is petitioner</b>	
Cont. from 021015, 021015, 031715, 040715		<b>Please see petition for details.</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 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: KT</b>
			<b>Reviewed on: 4/30/15</b>
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 13 - Rodriguez</b>

**14 Bernice Kasabian Irrevocable (Trust)**  
 Atty Teixeira, J. Stanley (for Jennifer Kapur Kirklin – Petitioner)  
 Atty Roberts, Gregory J. (for Dana Kahler – Trustee/Respondent)

Case No. 14CEPR01006

Probate Status Hearing RE: Accounting of Dana Kahler and Waivers of Bond

DOD: 01/17/13		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p style="text-align: center;"><b><u>OFF CALENDAR</u></b></p> <p>First and Final Account and Report of Former Trustee filed 4/22/15 is set for hearing on 6/8/15.</p>
Cont. from 030315, 041415		
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: skc
		Reviewed on: 4/30/15
		Updates:
		Recommendation:
		File 14 - Kasabian

Age:		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><b><u>OFF CALENDAR</u></b></p> <p>I&amp;A filed 1/12/15</p>
DOD:		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 4/30/15
		Updates:
		Recommendation:
		File 15 - Ragsdale

Probate Status Hearing Re: Filing of the Inventory and Appraisal

<b>DOD: 8/30/14</b>	<b>KAREN WARD</b> , Sister, was appointed Administrator with Full IAEA without bond on 1/6/15. Letters issued 1/13/15.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>1. Need Inventory and Appraisal pursuant to Probate Code §8800 or written status report pursuant to Local Rule 7.5.</b>
<b>Cont. from</b>	At hearing on 1/6/15, the Court set this status hearing for the filing of the Inventory and Appraisal.	
<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>		
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 4/30/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 16 - Oda</b>