

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

DOD: 7/25/2003	SARAH WELD is petitioner and requests appointment as Administrator With Will Annexed and without bond.		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Wednesday, September 10, 2014 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Wednesday, May 13, 2015 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
Cont. from 042114	GLENN M. KOTTCAMP was appointed Executor on 3/9/2004. Mr. Kottcamp died on 12/22/13 leaving a vacancy in the office of Executor.		
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory	All heirs waive bond and nominate petitioner.		
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.	Full IAEA – o.k.		
<input type="checkbox"/> Notice of Hrg	Will dated: 10/15/2001 was previously admitted to probate on 3/9/2004.		
<input checked="" type="checkbox"/> Aff.Mail	W/		
<input type="checkbox"/> Aff.Pub.	Residence: Fresno		
<input type="checkbox"/> Sp.Ntc.	Publication: Fresno Business Journal		
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen	Estimated value of the estate:		
<input checked="" type="checkbox"/> Letters	Personal property	- \$ 5,000.00	
	Real property	- <u>\$100,000.00</u>	
<input checked="" type="checkbox"/> Duties/Supp	Total	- \$105,000.00	
<input type="checkbox"/> Objections	Probate Referee: Steven Diebert		
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed by: KT
			Reviewed on: 5/2/14
			Updates:
			Recommendation: SUBMITTED
			File 1 – Kottcamp

(1) First and Final Account and Report of Executor and (2) Petition for Settlement Allowance of Commissions and Fees, and (3) Final Distribution

DOD: 6/6/2012		MARY LEIGH JORGENSEN , Administrator, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Disbursement schedule shows attorney costs totaling \$1,088.00. The costs are not itemized. Need itemization of costs. Order lists distributee as Mary Leigh Storey. Petition lists her as Mary Leigh Jorgensen. Need clarification or new order.
		Account period: 6/16/12 – 2/28/14	
Cont. from		Accounting - \$226,535.08	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$225,000.00	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$206,976.43	
<input checked="" type="checkbox"/>	Inventory	Administrator (statutory) - \$7,387.00	
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.	Attorney (statutory) - \$7,387.00	
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W/ Distribution, pursuant to Intestate succession, is to:	
	Aff.Pub.	Mary Leigh Storey - \$64,067.47	
	Sp.Ntc.	Monica Finn - \$64,067.47	
	Pers.Serv.	Leigh Storey - \$32,033.74	
	Conf. Screen	Ramsey Storey - \$32,033.74	
<input checked="" type="checkbox"/>	Letters	9/7/12	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 5/4/14
			Updates:
			Recommendation:
			File 3 - Storey

Atty Burk, John R., of Roseville (for Petitioner Nicole C. Evans, Administrator)

(1) Petition for Final Distribution on Waiver of Accounting and (2) for Allowance of Statutory Administrator and Attorney's Fees and (3) for Allowance of Extraordinary Attorney's Fees ****Ancillary Proceeding****

DOD: 12/5/2012		NICOLE C. EVANS , step-granddaughter and Administrator with Will Annexed, is Petitioner.		NEEDS/PROBLEMS/COMMENTS:	
		Accounting is waived ? (Need waivers)		Note: Decedent resided in the State of Utah, and other of Decedent's assets are subject to administration in that state. The instant <i>Petition</i> is for closure of this ancillary proceeding for Decedent's real property in Fresno County.	
Cont. from		I & A	—	\$160,000.00	<ol style="list-style-type: none"> Need <i>Notice of Hearing</i> and proof of service of notice to the following persons pursuant to Probate Code § 1220(a)(1) and (a)(2)(A) and § 11000 for settlement of the account: <ul style="list-style-type: none"> Nicole C. Evans, step-granddaughter and Administrator; Darrel Ray Howell, step-son; Kristina Byrd, step-granddaughter; Bradley Cook, step-grandson; Darrin Cook, step-grandson; Deena M. Coombs-Flores, step-granddaughter; Kelly M. Coombs, step-granddaughter; Marina L. Howell, step-granddaughter. <p>~Please see additional page~</p>
	Aff.Sub.Wit.	POH	—	\$ unspecified <i>(unspecified cash)</i>	
✓	Verified				
✓	Inventory	Administrator	—	\$? <i>(statutory)</i>	
✓	PTC				
✓	Not.Cred.	Attorney	—	\$? <i>(statutory)</i>	
	Notice of Hrg				
	Aff.Mail				
	Aff.Pub.	Attorney X/O	—	\$760.00 <i>(Itemized in Exhibit 14, for sale of real property.)</i>	
	Sp.Ntc.				
	Pers.Serv.	Closing	—	\$5,000.00	
	Conf. Screen	Distribution pursuant to Decedent's Will is to:			
	Letters	120413	<ul style="list-style-type: none"> DARRELL RAY HOWELL – [\$ unspecified cash] NICOLE C. EVANS – [\$ unspecified cash] KRISTINA BYRD – \$5,000.00 cash; BRADLEY COOK – \$5,000.00 cash; DARRIN COOK – \$5,000.00 cash; DEENA M. COMBS-FLORES – \$5,000.00 cash; KELLY M. COMBS – \$5,000.00 cash; MARINA L. HOWELL – \$5,000.00 cash. 		
	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
✓	9202				
	Order				
	Aff. Posting				
	Status Rpt				
	UCCJEA				
	Citation				
✓	FTB Notice				
				Reviewed by: LEG	
				Reviewed on: 5/2/14	
				Updates:	
				Recommendation:	
				File 4 - Howell	

NEEDS/PROBLEMS/COMMENTS, continued:

2. *Petition* provides no information regarding the sale of Decedent's real property except for the following: Paragraph 5, wherein it states the only asset that has come to the attention of the Administrator is the proceeds from the sale of the home in Fresno; and Paragraph 10, wherein it states Under the IAEA a *Notice of Proposed Action* was sent to all beneficiaries and heirs on 11/21/2013, regarding the terms of sale of the real property, and that no objections were received on or before 12/9/2013. *Petition* should but does not provide a statement regarding the sale price of the real property (without having to refer to the *Notice of Proposed Action* filed on 12/26/2013), and should provide a statement of the property on hand remaining in the estate available for distribution.
3. Paragraph 13 of the *Petition* states the statutory commissions are calculated at **\$6,550.00** based upon a fee basis of **\$185,000.00**. *Petition* does not but should provide the information regarding the **\$25,000.00** gain on sale that the *Petition* includes in the basis for the statutory fee calculation. (Note: *Notice of Proposed Action* filed 12/26/2013 indicates the sales price of **\$185,000.00**, and this information is not but should be provided in the *Petition*.)
4. Paragraph FOURTH of Decedent's Will devises the residue of the estate to **JUDY ANN HOWELL COOK**, step-daughter, who pre-deceased the Decedent (DOD 7/19/2011) at **50%** interest, to **DARRELL RAY HOWELL** at **35%** interest, and to **NICOLE C. EVANS** at **15%** interest. Exhibit 11 to *Petition* containing proposed distributions to beneficiaries under Decedent's Will does not explain the allocation of **70%** proposed distribution to **DARRELL RAY HOWELL** and the **30%** proposed distribution to **NICOLE C. EVANS**. Need clarification and/or authority to support the proposed distribution.
5. Exhibit 11 to *Petition* containing proposed distributions to beneficiaries under Decedent's Will does not provide the specific shares to be distributed to **DARRELL RAY HOWELL** and **NICOLE C. EVANS** in cash amounts rather than percentages of the estate pursuant to Local Rule 7.6.1 providing that monetary distributions must be stated in dollars, and not as a percentage of the estate.
6. Paragraph 12 of the *Petition* states the Administrator will file prior to the hearing *Waivers of Accounting* from each of the beneficiaries, copies of which will be attached as Exhibit 12. *Petition* does not include Exhibit 12, nor do Court records show *Waivers of Accounting* from the beneficiaries have been filed with the Court.
7. Need proposed order pursuant to Local Rule 7.1.1(F), which provides that a proposed order shall be submitted with all pleadings that request relief. Pursuant to Local Rule 7.6.1, proposed order must contain a statement of the balance of cash on hand in the estate and the dollar amounts to be distributed to each distributee.

Helen DOD: 01/15/07	GREGORY S. SNIDER , successor trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Stuart DOD: 06/16/13		
		OFF CALENDAR
	Petitioner states:	Amended Petition for Instructions filed 04/16/14 and set for hearing on 06/05/14
Cont. from 031214, 040914	1. STUART R. SNIDER (the "Decedent") and HELEN R. SNIDER, husband and wife, as settlors and trustees, established the STUART AND HELEN SNIDER LIVING TRUST by declaration of trust dated 09/13/01 (the "Trust").	CONTINUED FROM 03/12/14
<input type="checkbox"/> Aff.Sub.Wit.	2. Helen Snider died on 01/15/07.	Minute Order from 03/12/14 states: The Court notes that Mr. Snider is being represented solely as the successor trustee and is not advocating for any position. Amended Petition to be filed. Notice to be given to all parties. The Court will expect any objections to be provided to the Court in accordance with the appropriate rules of court and code sections.
<input checked="" type="checkbox"/> Verified	3. Upon Helens death, the Trust remained a single trust and remained revocable by the Decedent as the surviving settlor. Decedent became the sole trustee of the Trust upon Helen's death.	As of 04/07/14, nothing further has been filed in this matter.
<input type="checkbox"/> Inventory	4. On 04/20/12, the Decedent amended the Trust by a First Amendment to the Trust. On 04/21/12, Decedent resigned as trustee of the Trust and Petitioner, Greg Snider, the son of Decedent, became the sole successor trustee.	Note: Amanda Bonk, decedent's granddaughter was appointed as Guardian Ad Litem for minor beneficiaries of the Trust – Paige Fowler, Hailey Bonk & Brooklyn Bonk. It is unclear whether the Guardian Ad Litem or her attorney (Melissa Webb) will be filing any opinion regarding the Petition on behalf of the minor beneficiaries.
<input type="checkbox"/> PTC	5. On 05/30/12, the Decedent executed a document entitled "Last Will and Testament of Stuart Snider" and also on 04/08/13, Decedent executed a document entitled "Last Will and Testament of Stuart Snider".	1. Notice of hearing to Michael Bonk, Hailey Bonk, Heather DeVoto and Brooklyn Bonk was sent in care of Roger Bonk, notice of hearing to Paige Fowler was sent in care of Amanda Bonk, and notice of hearing to Jeanette Frye was sent in care of Dennis Frye; notice mailed to a person in care of another is insufficient, pursuant to California Rules of Court 7.51(a)(2).
<input type="checkbox"/> Not.Cred.	6. Decedent died on 06/16/13 and upon his death, the Trust became irrevocable. Petitioner continues to serve as the sole successor trustee of the Trust.	
<input checked="" type="checkbox"/> Notice of Hrg	7. The Trust and First Amendment were prepared by Decedent's attorneys. After executing the First Amendment, Decedent indicated to Petitioner that he wanted to make additional changes to the Trust, but did not want to incur additional legal expenses to do so.	
<input checked="" type="checkbox"/> Aff.Mail w/	8. Due to Decedent's advanced Parkinsons disease, the Decedent was unable to write or type the Second Amendment and instead, he dictated the contents to his caregiver who then typed it and Decedent signed it.	
<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		Reviewed by: JF
<input type="checkbox"/> Status Rpt		Reviewed on: 05/02/14
<input type="checkbox"/> UCCJEA		Updates:
<input type="checkbox"/> Citation		Recommendation:
<input type="checkbox"/> FTB Notice		File 5 – Snider

Continued on Page 2

9. The Second Amendment was delivered to Petitioner as trustee of the Trust.
10. A third Amendment was also dictated by the Decedent to his caregiver who typed it and Decedent signed it. The Third Amendment was also delivered to Petitioner as Trustee of the Trust.
11. The dispositive provisions of the Trust are set forth in Section 6.3 of the Trust. The First Amendment to the Trust revised these dispositive provisions in their entirety so that upon the death of Decedent, the Trust estate was to be distributed as follows:
 - a. Tangible personal property was to be distributed by memorandum or designated then the remainder was to be distributed to the Decedent's children: Gregory Snider and Sheryl Hastay (also known as Sheryl Kilgallen).
 - b. The sum of twenty five thousand dollars (\$25,000.00) was to be distributed to each of Decedent's children: Gregory Snider and Sheryl Hastay.
 - c. The sum of twelve thousand dollars (\$12,000.00) was to be distributed to each of the Decedent's grandchildren: Amanda Bonk, Michael Bonk, and Emily Hastay.
 - d. The sum of seven thousand dollars (\$7,000.00) was to be distributed to each of the Decedent's then living great-grandchildren: Paige Fowler and Hailey Bonk.
 - e. The sum of ten thousand dollars (\$10,000.00) was to be distributed to the Decedent's brother, David Snider.
 - f. The sum of five thousand dollars (\$5,000.00) was to be distributed to each of Martha Martinez Villegas and Jennifer Gutierrez, former employees of the Decedent;
 - g. The remaining trust estate was to be distributed in equal shares to the Decedent's children: Gregory Snider and Sheryl Hastay.
12. The Second Amendment revised the dispositive provisions in their entirety and specifically states as follows: "[e]verything else goes in a trust. I wish to give Greg, Sherry, Amanda, Emily, David and Jeanette \$10,000.00 each from the trust. The remaining amount in the trust is to be divided equally among Greg, Amy, Sherry, Amanda, Emily, Paige, Hilary, Michael and Heather." Petitioner alleges that the reference to Hilary is a typo and actually refers to Hailey Bonk. Greg and Sherry are the Decedent's children. Amanda, Emily and Michael are the Decedent's grandchildren. David is the Decedent's brother. Jeanette is the Decedent's girlfriend. Amy is the Decedent's daughter-in-law. Paige and Hailey are the then living great grandchildren of the Decedent. Heather is the partner of Decedent's grandson Michael.
13. The Third Amendment again revised the dispositive provisions in their entirety and specifically states as follows: "[t]rust funds are to be divided equally among: Greg, Sherry, Michael, Emily, Paige, Hilary, Jeanette, David, Amy, Heather and Michael and Heather's unborn child. Amanda will get my personal property that she stored for me including the wheelchairs." Michael and Heather's child, Brooklyn, was born after the Third Amendment was signed.
14. Petitioner believes that Decedent intended that the Second and Third Amendments to be amendments to the Trust.
15. The relevant portion of Article Three, Section 3.2 of the Trust provides as follows: "[a]fter the death of the deceased settlor, the surviving settlor may at any time amend, revoke, or terminate, in whole or in part, any trust created by this amendment other than the Disclaimer Trust, which shall be irrevocable and not subject to amendment."
16. The relevant portion of Article Three, Section 3.3 of the Trust provides as follows: "[a]ny amendments, revocation, or termination of any trust created by this instrument shall be made by written instrument signed by both settlors or by the settlor making the revocation, amendment, or termination, and delivered to the trustee."

Continued on Page 3

17. Based on Probate Code §§ 15401(a)(1) and 15402, Petitioner believes that the Second and Third Amendments were validly executed amendments to the Trust under the terms of the Trust and California law and that the Trust estate should be distributed pursuant to the provisions of the Third Amendment.
18. Petitioner states that the titles of the Second Amendment and the Third Amendment, "Last Will and Testament of Stuart Snider" and "Last Will and Testament of Stuart Snider Revised," respectively, were simple scrivener mistakes. The caregiver did not have a legal background and was not aware that the documents should have been titled as trust amendments rather than wills.
19. Under Probate Code § 17200(a), the Court has the jurisdiction to determine the validity of a trust amendment. Accordingly, Petitioner requests that the Court confirm and declare that the Third Amendment is a valid amendment to the Trust and that the Trust estate should be distributed in accordance with the terms of the Third Amendment.

Petitioner prays for an Order:

1. Confirming and declaring that the Third Amendment is a valid amendment to the Trust; and
2. Instructing Greg Snider, as trustee of the Trust, to distribute the remaining assets of the Trust in accordance with the terms of the Third Amendment.

DOD: 07/18/2013		<p>ANASTASIA HENDRIX, AMY NORVELLE, and JOHN T. HENDRIX, Trustees of the Patrick John Hendrix Revocable Living Trust, are petitioners.</p> <p>40 days since DOD</p> <p>No other proceedings</p> <p>I&A - \$14,166.00</p> <p>Will dated: ?</p> <p>Petitioners request Court determination that decedent's interest in real property pass to the Patrick John Hendrix Revocable Living Trust.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Pursuant to Probate Code §13152(c) a copy of the will must be attached to the petition. Need Attachment 11 containing (1) the legal description of the real property and its APN and (2) decedent's interest in the property. Need new order. <p>Note: Amended Petition must be complete in itself and cannot rely on the previously filed petition.</p>
Cont. from 022614, 031914			
<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 type="checkbox"/>	Notice of Hrg x		
<input type="checkbox"/>	Aff.Mail x		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: LV</p> <p>Reviewed on: 05/02/2014</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 6 – Hendrix</p>	

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

DOD: 01/11/2009	RONALD D. MANLEY , brother/named executor without bond, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>7B is the Contest of Will, Objection to Probate, Objection to Appointment of Ronald Manley as Executor of Estate of Donald C. Manley filed by Leslie Smith Guardian Ad Litem for Noah Manley.</p> <p>1. Petition lists the estimated value of the estate at \$0. Decedent's will lists specific assets such as a 401K and a boat. Need clarification.</p> <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Wednesday, 10/08/2014 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Wednesday, 07/08/2015 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
	Full IAEA- o.k.	
	Will dated: 09/14/2008	
Cont. from 040714		
<input checked="" type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Residence: Clovis Publication: The Business Journal	
Inventory		
PTC	Estimated value of the Estate:	
Not.Cred.	Total - \$0	
<input checked="" type="checkbox"/> Notice of Hrg	Probate Referee: Rick Smith	
<input checked="" type="checkbox"/> Aff.Mail	w/	
<input checked="" type="checkbox"/> Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input checked="" type="checkbox"/> Objections		
Video Receipt		
CI Report		
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 05/02/2014
		Updates:
		Recommendation:
		File 7A – Manley

Contest of Will, Objection to Probate, Objection to Appointment of Ronald Manley as Executor of Estate of Donald C. Manley

		<p>NOAH MANLEY, by and through Guardian Ad Litem, LESLIE SMITH, is petitioner.</p> <p>Petitioner states: contestant Noah Manley is the son of the decedent. The contestant objects to the probate of the purported will on the ground that the signature on the document purporting to be the last will of the decedent is not in the handwriting of the decedent; the purported will was thus not duly executed by the decedent as required by law.</p> <p>Contestant objects to the appointment of Ronald D. Manley as Executor of the Estate of Donald C. Manley, the following grounds:</p> <ol style="list-style-type: none"> a. Ronald D. Manley neglected, failed and or refused to deposit the purported last will of Donald C. Manley with this court in a timely manner. b. Ronald D. Manley represented to Contestant and other heirs of Donald C. Manley that the will was of Donald C. Manley was a holographic will and, over four years after the death of Donald C. Manley, submitted a purported typewritten will to this court for probate. c. Contestant is informed and believes and based on such information and belief alleges that Ronald D. Manley has breached his fiduciary duty in that <ol style="list-style-type: none"> i. Ronald D. Manley was employed as an administrator for the Don Manley 401 (k) Profit Sharing Plan account with Gary Brown Construction. ii. Pursuant to the Beneficiary Designation of that Plan, upon the Death of Donald C. Manley, 50% of that 401 (k) Plan was to be paid to “the trustee of the trust for Noah Manley under my last will”. iii. At the time of the decedent’s death, the sum of \$230,757.91 was in the 4019k) Plan. <p>Please see additional page</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Opposition of will was not verified. 2. Need summons to be issued and served, with a copy of the objection. The Summons shall contain a direction that the persons summoned filed with the court a written pleading in response to the contest within 30 days of the summons. 3. Need proof of service of summons. 4. Need Order.
Cont. from			
Aff.Sub.Wit.			
Verified	x		
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	x		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: LV</p> <p>Reviewed on: 05/02/2014</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7B - Manley</p>	

- iv. Despite demands therefor, Ronald C. Manley has not provided Contestant with any accountings of the funds he received from this 401(k).
- v. Some or all of Contestant's funds from the Plan were paid directly to Ronald C. Manley at Ronald C. Manley's direction.
- vi. Ronald C. Manley has converted some or all of these funds for his personal use and benefit.

Wherefore, the contestant requests

1. That the purported will be denied probate
2. That the Public Guardian be named Administrator of the Estate of Donald D. Manley;
3. For costs of suit; and
4. For such other relief as this court deems proper.

DOD: 3-17-13		<p>BROOKE ROBERTSON, Beneficiary, is Petitioner.</p> <p>Petitioner states her half-sister BAYLIE ROBERTSON is the currently acting successor trustee of the trust, which was created on 8-11-04 and amended on 3-2-13.</p> <p>The amendment dated 3-2-13 provides, among other things, that the decedent's real property located at Shaver Lake shall be sold and the proceeds will be distributed 50% to Petitioner Brooke Robertson and 50% in trust for Brooke's son Mattox Hayes until he turns 25. The Shaver Lake property was properly titled in the name of the trustee of the trust at the settlor's death.</p> <p>To facilitate the sale and distribution of the property, the current trustee Baylie Robertson has consented to the appointment of a Special Trustee for the purpose of managing and administering the Shaver Lake property, including coordinating the sale and distribution of the proceeds. Petitioner requested that her step-father TARIQ ABBASI serve as Special Trustee, and Mr. Abbasi has consented to serve. If he becomes unable or unwilling to serve, the parties have agreed that his wife SHEILA ABBASI (Petitioner's mother and Mattox's grandmother) will serve as successor Special Trustee.</p> <p>The Petition lists the obligations and duties of the Special Trustee with regard to the Shaver Lake property and states that upon appointment of a Special Trustee, Baylie will remain trustee of the remaining trust assets and shall remain subject to all other fiduciary duties incident to such position, but will have no ongoing fiduciary duties to Brooke, Mattox, or the trustee of the Mattox Trust in connection with the property, and no rights or power of supervision over the Shaver Lake property.</p> <p>In addition, Baylie has also declined to serve as trustee of the Mattox Trust in favor of Tariq, who has also consented to serve as Trustee of the Mattox Trust. Again, if he becomes unable or unwilling to serve, the parties have agreed that Sheila will serve.</p> <p style="text-align: center;"><u>SEE ADDITIONAL PAGE</u></p>	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Minute Order 4-23-14: Discussed issues on examiner notes in open court. Counsel is informed to include in order that any fees requested are subject to court approval. Continued to 5-7-14.</p> <p>The following issues remain:</p> <p>See Additional page</p> <hr/> <p>Reviewed by: skc</p> <p>Reviewed on: 5-2-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 8 – Robertson</p>	
Cont from 042314				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
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<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Petitioner requests an order:

1. Appointing Tariq to serve as Trustee of the Mattox Trust;
2. Appointing Sheila to serve as Successor Trustee of the Mattox Trust;
3. Appointing Tariq to serve as Special Trustee of the Trust with respect to the Shaver Lake property in a manner consistent with the terms of the trust, which shall include, without limitation, coordinating the sale of the property and distributing the net proceeds therefrom to Brooke and the Trustee of the Mattox Trust in equal shares;
4. Appointing Sheila to serve as Successor Special Trustee of the trust with respect to the Shaver Lake property;
5. Directing the Special Trustee of the Trust to distribute the net proceeds from the sale of the Shaver Lake property to Brooke and the Trustee of the Mattox Trust, in equal shares, within 30 days of the close of escrow;
6. Confirming that the Special Trustee shall have all powers provided for under the terms of the trust as listed (*See Petition for details*);
7. Directing Baylie to transfer title of the Shaver Lake property to Tariq, as Special Trustee of the Trust, as soon as reasonably possible, but in no event later than 15 days following entry of the Court's order;
8. Confirming that the Special Trustee of the Trust shall have sole and absolute discretion with respect to all matters related to the listing and sale of the Shaver Lake property, including the determination of any and all terms thereof (e.g., purchase price, agreed upon repairs, allocation of costs and expenses, timing of sale, etc.);
9. Confirming that upon the appointment of the Special Trustee and the subsequent transfer of title that Baylie shall not have ongoing fiduciary duties to Brooke, Mattox, or the Trustee of the Mattox Trust in connection with the Shaver Lake property and that Baylie shall remain trustee of the remaining Trust assets;
10. As Trustee, upon appointment of the Special Trustee, Baylie shall have no rights or power of supervision with respect to the Shaver Lake property or the distribution of the net proceeds resulting therefrom;
11. Confirming that the terms of the Mattox Trust shall otherwise remain unchanged; and
12. For any other relief the Court deems just and proper.

Page 3

The following issues were previously noted. See updates below each item.

1. The petition does not state the names and addresses of each person entitled to notice. See Probate Code §17201. Need verified declaration setting forth his information.

Update: The attorney's declaration (not verified) describes the various terms and beneficiaries; however, a comprehensive verified list has not been provided.

2. Beneficiary Mattox Robertson was served "C/O" Brooke Robertson. Service in the care of another is not sufficient. Direct notice is required, even to minors. See Cal. Rules of Court 7.51(d). The Court may require proper notice.

Update: The attorney's declaration states the minor does not need to be served pursuant to Probate Code §1460.1. However, Examiner notes that §1460.1 applies to guardianship and conservatorship matters. This is a trust matter. See applicable code and rules of court.

3. The petition does not address the issue of bond. Probate Code §15602(a)(3) requires bond if an individual who is not named in the trust instrument is appointed as trustee by the Court. It does not appear that bond can be waived pursuant to subsection (b) because one of the beneficiaries is a minor. Therefore, need estimate of value of the Shaver Lake property in order to fix bond. |

Update: The proposed order requires Tariq Abbasi to obtain bond in the amount of \$250,000.00 based on an appraisal of the property (attached); however, it does not specify if the bond is in connection with his appointment as special trustee for the Shaver Lake property or as trustee of the Mattox Trust or both. The Court may require clarification or revised language.

4. It appears Petitioner is also requesting that the Court authorize appointment of Sheila Abbasi as both Successor Special Trustee regarding the Shave Lake property and as successor trustee of both the Mattox Trust without further Court authorization. Need clarification and authority. The Court may require further noticed petition and bond in the event of her appointment, or consent from Sheila Abbasi and bond covering her as well at this time.

Update: The proposed order requires further court approval and consent for Shelia Abbasi's appointment if Mr. Abbasi can no longer serve.

5. Petitioner does not address compensation to the proposed Special Trustee or Trustee of the Mattox Trust, or the proposed successor. The Court may require clarification.

Update: According to the 4-23-14 minute order, fees are to be subject to court approval. However, the proposed order does not appear to include any language regarding fees.

Note: If granted, the Court will set a status hearing for filing of the bond by Special Trustee Tariq Abbasi on Friday 6-13-14. (If filed, the status hearing may be taken off calendar.)

DOD: 10-1-13		<p>LUCEEN A. LOPOPOLO, Spouse and Trustee of The Lopopolo Family Trust, is Petitioner.</p> <p>40 days since DOD</p> <p>No other proceedings</p> <p>Will dated 5-19-99 devises the estate to The Lopopolo Family Trust.</p> <p>Petitioner requests Court determination that Decedent's 1/5 interest as tenant-in-common in certain real property passes to Petitioner as trustee of The Lopopolo Family Trust pursuant to Decedent's will.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need declaration of trustee pursuant to Local Rule 7.12.5.</p>	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
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<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			<p>Reviewed by: skc</p> <p>Reviewed on: 5-2-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 10 - Lopopolo</p>	

DOD: 04/09/12	SCOTT WORTHINGTON , son, filed a Petition for Probate on 04/18/13, seeking to admit decedent's will to probate and be appointed as Executor without bond.	NEEDS/PROBLEMS/COMMENTS:
	CYNTHIA SCHMIDT , daughter, filed an Objection to Petition for Probate of Will on 05/29/13.	CONTINUED FROM 04/15/14 As of 05/02/14, nothing further has been filed in this matter.
Cont. from 022714, 041514	The parties participated in a settlement conference on 01/13/14. Minute Order from 01/13/14 states: Counsel will submit settlement agreement per conference conversation. Status Hearing on 02/27/14, Courtcall allowed.	1. Need Settlement Agreement and/or Status Update Report.
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: JF
		Reviewed on: 05/02/14
		Updates:
		Recommendation:
		File 12 – Worthington

Status Hearing Re: Settlement Agreement

Celia DOD: 04/09/12	SCOTT WORTHINGTON , son, filed a Petition to Terminate an Irrevocable Trust on 05/23/13 and set for hearing on 07/15/13.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 04/15/14 As of 05/02/14, nothing further has been filed in this matter.</p> <p>Note: Public Guardian filed a Petition for Fees that was granted on 12/09/13. The Petition for Fees was filed without payment of a filing fee. Minute Order from hearing on 12/09/13 ordered that the Trustee of the Trust was to pay the filing fees. As of 05/02/14, the filing fees have not been paid and the Order for Fees has not been signed.</p> <p>1. Need Settlement Agreement and/or Status Update Report.</p> <p>Note to Judge: the Order for Fees for the Public Guardian and her attorney is in the file for signature, however, because the filing fees have not been paid, the order should not be signed yet.</p> <p>Reviewed by: JF</p> <p>Reviewed on: 05/02/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13 – Worthington</p>
	At the 07/15/13 hearing, the Court set the matter for a settlement conference on 08/12/13.	
Cont. from 022714, 041514		
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>Minute Order from settlement conference on 08/12/13 states: Parties engage in settlement discussions with the Court. Based on the discussions, the Public Guardian is appointed for the benefit of Fred Worthington. The Court directs the Public Guardian to meet with Fred Worthington and speak with counsel regarding an evaluation to determine the appropriate level of care for him. The Court obtains consent from all counsel to engage in ex parte communications with the Public Guardian. The Court directs that a list of items be prepared within two weeks and an order as set forth be prepared by counsel. The Court sets a Status Hearing for the Public Guardian on 09/09/13. The Court indicates for the minute order that Mr. Dornay's presence will not be required on 09/09/13. The Court will expect appropriate status reports to be filed for the upcoming hearings.</p> <p>Minute Order from status hearing on 09/09/13 states: Mr. Picone is appearing via Courtcall. Mr. Picone informs the Court that his client has complied with the requirements thus far. Ms. Kruthers informs the Court that the Public Guardian believes Fred Worthington's needs can be taken care of at home, but trust funds would be needed. The Court is satisfied with the report from the Public Guardian. The Court thanks the Public Guardian for their services in this matter. The Court orders that Fred Worthington not be moved without a prior court order.</p> <p>Minute Order from further settlement conference on 01/13/14 states: Counsel will submit settlement agreement per conversation. Status Hearing on 02/27/14, Courtcall allowed.</p> <p style="text-align: center;">Continued on Page 2</p>	

Status Conference Statement of Petitioner Scott J. Worthington filed 02/25/14 states:

1. A settlement conference was held in this matter on 01/13/14. The parties are to submit a settlement agreement, and are still working on that agreement. The Settlement agreement is to include, but is not limited to the following:
 - a. The appointment of a neutral successor trustee to administer the assets of the Trust. Bruce Bickel has agreed to act as the successor trustee for the trust.
 - b. The transfer of Bank of America Acct. ending in 3121, amounting to approximately \$211,000.00 (the sole asset of Fresno County Superior Court Case No. 13CEPR00336) into *The Worthington Family Grantor Trust dated 12/28/11* (the "Trust").
 - c. All assets of Trust, including the residence located at 22561 Auberry Road, Auberry, CA are to be administered for the benefit of Frederick A. Worthington.
 - d. The successor trustee is to select the contractor from the bids submitted to make the necessary repairs to the residence located at 22561 Auberry Road, Auberry, CA so that Frederick Worthington can live at the residence with in-home care. The costs of the repairs are to be paid out of the assets of the Trust.
 - e. Frederick Worthington will require in home care services while he resides at the residence located at 22561 Auberry Road, Auberry, CA. In home care services are to be provided on a 24-hour basis for seven days a week. Said in home care services are to be paid with any income earned by Frederick Worthington while he resides at the Auberry residence and out of the Trust.
 - f. The successor trustee shall select the in-home care provider to provide the in home care services required for Frederick Worthington.
 - g. Petitioner shall be responsible for moving Frederick Worthington into the Auberry residence once the necessary repairs have been made.
 - h. The successor trustee shall take possession of all tangible and intangible personal property of Frederick Worthington currently in the possession of petitioner and respondent and deliver said property to Frederick Worthington.
2. Although certain items of tangible personal property have been returned to Frederick Worthington by Respondent, Cynthia Schmidt, according to petitioner, Scott Worthington, the following items of tangible and intangible personal property have not been returned:
 - a. The *Certificate of Crossing the Equator*.
 - b. The Merchant Marine ring from WWII.
 - c. The matching rings worn by Frederick Worthington and his brother.
 - d. Celia Worthington's ashes.
 - e. The glass figurines that were on the fireplace mantle.
 - f. The family photo album of Frederick Worthington's family.
 - g. Some old plates in a wooden box.
 - h. Three butterfly trays.
 - i. A life insurance policy belonging to Frederick Worthington.
 - j. Military dog tags belonging to Frederick Worthington.
3. Petitioner is also concerned that Cynthia Schmidt has not accounted for or provided an explanation for the following:
 - a. Bank of America CD ending in 1508 held in the name of Celia Worthington and having a value of \$35,135.26 on 02/15/11, which Petitioner believes was not added to Bank of America Acct ending in 3121 and is not part of the approximately \$211,000.00 held in that account.
 - b. The status of the car owned by Frederick Worthington.

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

		<p>WAYNE L. BANDY, spouse, ARTHUR OSTRANDER, friend (CPA), and TERRY NOVAK, friend (Caregiver), are Petitioners and request appointment as Co-Conservators of the Person and Estate with independent powers under Probate Code §2590 (not specified).</p> <p>Voting rights <u>NOT</u> affected</p> <p>A Capacity Declaration was filed on 4-1-14.</p> <p>Estimated Value of Estate: Personal property: \$10,000.00 Real property: \$237,000.00</p> <p>Petitioners state Mrs. Bandy suffered from cancer of the neck and now suffers from skin cancer. Treatment has affected her speech and her writing. She is restricted to a wheelchair and requires total care. She is coherent and understands what is being told to her, but it is difficult to understand her due to her speech impairment.</p> <p>Court Investigator Jennifer Daniel filed a report on 4-30-14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator advised rights on 4-10-14.</p> <ol style="list-style-type: none"> 1. The petition requests independent powers under Probate Code §2590; however, the specific powers requested are not detailed per Local Rule 7.15.2. Need clarification. 2. Petitioners request appointment without bond; however, pursuant to Probate Code §2320 and Cal. Rules of Court 7.207, bond is required for all conservators of the estate, including cost of recovery. Bond should be at least \$11,000.00. 3. Need Video Receipt per Local Rule 7.15.8.A for all petitioners. <p><u>Note:</u> If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> • Wednesday 6-25-14 for filing of bond • Wednesday 10-8-14 for filing the Inventory and Appraisal • Wednesday 10-7-15 for filing the first account. <p>If the foregoing items are on file, the status hearings may be taken off calendar.</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			
		<p>Reviewed by: skc</p> <p>Reviewed on: 5-2-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 14 - Bandy</p>		

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

DOD: 04/15/2005	MARY GALLEGOS-BATES , sister, was appointed Administrator with full IAEA without bond on 08/02/2005.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Attorney Patricia Carrillo was relieved as counsel to Mary Gallegos-Bates on 04/02/2014.</p> <p>Minute Order of 04/02/2014: Ms. Carrillo is directed to provide Ms. Gallegos-Bates any documents she has. Matter continued for Ms. Gallegos-Bates to hire new counsel.</p> <p>1. Need First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
	Letters issued on 08/11/2005.	
Cont. from 022114 , 040214	Inventory and Appraisal was filed on 09/28/2005 shows an estate valued at \$200,000.00 consisting of real property.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC	First Account or Petition for Final Distribution was due on 10/2006.	
Not.Cred.		
Notice of Hrg	Notice of Status Hearing was mailed to Attorney Patricia Carrillo and Mary Gallegos-Bates on 11/22/2013.	
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: 05/05/2014
		Updates:
		Recommendation:
		File 15 – Gallegos

Age: 7 years		<p>CHRISTINA RODRIGUEZ, mother, is petitioner.</p> <p>REED BISSEGGER and GRACIE BISSEGGER, maternal grandparents, were appointed guardians on 11/5/2007.</p> <p>Petitioner states there is currently a court order allowing her visitation with her son once per week. Her mother [guardian], Gracie Bissegger is not allowing visits with her son. She is violating the court order. The last time petitioner spoke with the guardian she stated that she has moved and is not letting Petitioner know her new address. She also changed her phone number so now Petitioner has no contact with her.</p> <p>Current visitation order per minute order dated 7/19/12 states the prior order of 10/1/09 remains in full force and effect (see below). The guardian is ordered to cooperate with visitation. Parties mutually agree on a location for visitation. The court orders that if mother is visiting at the guardian's home, she is to come alone. Mother is directed to contact the guardian to arrange visitation.</p> <p>Minute order dated 10/1/09 states the court orders supervised visitation with the mother. The court will not allow overnight visits at this time. Parties can mutually agree on the times.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service of the Notice of Hearing on: <ol style="list-style-type: none"> a. Reed Bessegger (guardian) b. Gracie Bissegger (guardian) 	
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			X
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p>Reviewed by: KT</p> <p>Reviewed on: 5/5/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 16 - Lopez</p>		

17A Janessa & Jenna Lopez (GUARD/P)
 Atty Lopez, Tina (Pro Per – Petitioner – Paternal Grandmother)
 Atty Mason, Katrina (Pro Per – Objector – Maternal Grandmother)
 Atty Lamphere, Breanna (Pro Per – Objector – Mother)

Case No. 14CEPR00094

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

Janessa, 2	TEMPORARY EXPIRES 05/07/14		NEEDS/PROBLEMS/COMMENTS:
Jenna, 10 months	TINA LOPEZ, paternal grandmother, is Petitioner.		
Cont. from 040814	Father: JACOB LOPEZ		<p>17B is the competing petition filed by Katrina Mason, Maternal Grandmother.</p> <ol style="list-style-type: none"> Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> Jacob Lopez (Father) Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> James Lopez (Paternal Grandfather) Maternal Grandfather (Unknown) <p style="text-align: center;"><u>Please see additional page</u></p>
Aff.Sub.Wit.	Mother: BREANNA LAMPHERE – Declaration of Due Diligence filed 02/03/14, personally served on 03/05/2014		
✓ Verified	Paternal grandfather: James Lopez		
Inventory	Maternal grandfather: Unknown		
PTC	Maternal grandmother: Katrina Mason, personally served on 03/05/2014		
Not.Cred.	Petitioner states that the father is in jail and the mother has abandoned the children, is on drugs and homeless.		
✓ Notice of Hrg	Objection filed by Katrina Mason, Maternal Grandmother, on 03/07/2014 states she believes that the children need to continue to see their mother so that they may continue to grow the bond they already have. Jacob Lopez, father of the minors is physically abusive to the mother and family members are mentally abusive. Ms. Mason feels that the mother's decision to separate from them and recover in Iowa with the full support of her family is a positive one and will help the mother and children transition well during recovery.		
Aff.Mail	x		
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			
<u>Please see additional page</u>			<p>Reviewed by: LV</p> <p>Reviewed on: 05/05/2014</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 17A – Lopez</p>

Objection filed by Breanna Lamphere, Mother, on 03/07/2014 states she wants her children close to her during her extensive hospital stay so that she can continue to grow the bond with her children that they already have. She states that her mother, Katrina Mason, is filing for guardianship she fully supports that she can provide a loving, nurturing stable environment in which the mother and the children can continue their bond. Due to the domestic violence and the mental abuse from parents and family members Ms. Lamphere does not feel she will have a fair chance at staying away from the abuse. She states she is transferring to St. Luke's in Iowa where she will have the full support of her mother and family in her recovery.

Court Investigator Charlotte Bien's report filed 03/14/2014.

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

Janessa, 2	KATRINA MASON, maternal grandmother, is petitioner.		NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 2. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Jacob Lopez (Father) • Tina Lopez (Paternal Grandmother/Temporary Guardian) 3. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • James Lopez (Paternal Grandfather) • Mark Lamphere (Maternal Grandfather)
Jenna, 10 months	Father: JACOB LOPEZ		
	Mother: BREANNA LAMPHERE, Nominates petitioner, consents and waives notice		
Cont. from	Paternal Grandfather: James Lopez		
Aff.Sub.Wit.	Paternal Grandmother: Tina Lopez		
✓ Verified	Maternal Grandfather: Mark Lamphere		
Inventory	Petitioner states: the mother will be undergoing surgery and in extensive rehab. She will be doing this in Iowa so family can care for her and so that she and children can be away from their physically abusive father.		
PTC	Court Investigator Charlotte Bien's report filed 03/14/2014.		
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			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
Reviewed by: LV			
Reviewed on: 05/05/2014			
Updates:			
Recommendation:			
File 17B - Lopez			

		NO TEMP REQUESTED	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Court Investigator advised rights on 4-8-14</u></p> <p><u>Voting rights affected – Need minute order</u></p> <ol style="list-style-type: none"> 1. Need Citation. 2. Need proof of personal service of Citation with a copy of the petition at least 15 days prior to the hearing on the proposed Conservatee Zack Medina per Probate Code §1824. 3. Need Notice of Hearing. 4. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1822 on: <ul style="list-style-type: none"> - Glenn Medina (Father) - Victor Medina (Paternal Grandfather) - Lely Medina (Paternal Grandmother) - Gene Lewis (Maternal Grandfather) - Beverly Lewis (Maternal Grandmother) - Jake Medina (Brother) - Lexi Medina (Sister) 5. Need proof of service of Notice of Hearing with a copy of the petition at least <u>30</u> days prior to the hearing on CVRC per Probate Code §1822(e). 6. The Court may require additional information regarding Petitioner's fee waiver. <p>Note: If granted, the order will indicate at #34 that conservatorship is effective on the date the minor attains majority.</p> <p>Reviewed by: skc</p> <p>Reviewed on: 5-5-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 18 - Medina</p>
		KATHLEEN MEDINA , Mother, is Petitioner and requests appointment as Conservator of the Person with medical consent powers.	
	Aff.Sub.Wit.	Voting rights affected	
✓	Verified	A Capacity Declaration was filed 3-27-14.	
	Inventory	Petitioner states she is the mother of the proposed Conservatee. She has taken care of his personal business and financial decisions. She has made sure he gets medical attention when needed. She has also made sure his interests are protected.	
	PTC	Court Investigator Charlotte Bien filed a report on 4-14-14. The report states Zack was diagnosed at age 2 with having Autistic disorder, and is unable talk, read, or write, and requires 24-hour supervision. Zack resides at home with his parents, Kathy and Glenn Medina, and his siblings, Jake and Lexi. Zack is a client of CVRC and his case manager suggested that Petitioner seek conservatorship prior to his 18 th birthday so there would not be any lapse in services. Petitioner also works with an autism specialist in Florida and states there are not a lot of services offered locally. He has horse-riding therapy every Monday, which he enjoys. Zack's father Glenn agrees with Kathy being his conservator alone because he works full time and is not usually able to attend appointments, etc.	
	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		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation	X	
	FTB Notice		
		The report states it appears to be in Zack's best interest that his mother be appointed as conservator of his person with medical consent powers and it is recommended that the petition be GRANTED.	

Pro Per Garcia, Sandra (Pro Per Petitioner, mother)

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

Age: 21 years		<p align="center">NO TEMPORARY REQUESTED</p> <p>SANDRA GARCIA, mother, is Petitioner and requests appointment as Conservator of the Person with medical consent powers.</p> <p>Need Capacity Declaration.</p> <p>Petitioner states the proposed Conservatee suffers from mental disabilities, and has issues and episodes.</p> <p>Petitioner attaches a list of the following problems applicable to the proposed Conservatee:</p> <ul style="list-style-type: none"> • Unable to make decisions about her education; • Unable to make decisions about her residence; • Unable to make medical decisions; • Unable to enter a contract; • Unable to make decisions about her social contacts; • Unable to be left alone; • Unable to prepare her own meals; • Unable to perceive or appreciate danger, including financial or personal abuse; • Unable to handle any and all of her financial needs. <p>Petitioner states in addition to that mentioned in the list above that the proposed Conservatee won't talk to anyone or answer questions when asked, and she doesn't like to hear anything about her, for example her age, and she doesn't like to hear anyone talking about her life at all in her presence. Petitioner states the proposed Conservatee is unable to go anywhere by herself, and is unable to function independently in the workplace.</p>	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Court Investigator Samantha Henson to provide CI Report and Advisement of Rights.</p> <ol style="list-style-type: none"> 1. Need Citation for Conservatorship pursuant to Probate Code § 1823, and proof of personal service of the Citation on the Conservatee with a copy of the <i>Petition for Appointment of Probate Conservator</i> pursuant to Probate Code § 1824. 2. Petition requests medical consent powers. Need <i>Medical Capacity Declaration</i> (Judicial Council form GC-335) in support of Petitioner's request pursuant to Probate Code § 1890(c). 3. Need <i>Conservatorship Video Viewing Certificate</i> pursuant to Local Rule 7.15.9(A).
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Reviewed by: LEG			
Reviewed on: 5/5/14			
Updates:			
Recommendation:			
File 19 - Garcia			

Petition for Appointment of Temporary Guardian of the Person (Prob. C. 2250)

Age: 6 years		<p>TEMPORARY (granted ex parte) EXPIRES <u>5/7/14</u></p> <p>GENERAL HEARING 6/23/14</p> <p>ANTOINETTE M. FULLER, paternal aunt, is petitioner.</p> <p>Father: ORRIN V. FULLER</p> <p>Mother: MELISSA (last name unknown)</p> <p>Paternal grandfather: Anthony Fuller Paternal grandmother: Jeraldine McCoy-Koontz. Maternal grandparents: Unknown</p> <p>Petitioner states the minor's father has recently spoken of returning the minor to his home for a visit. Since then the minor has been telling Petitioner and other family members of the abusive things taking place in her father's household. Petitioner believes the minor's statements that she is being abused and neglected. The minor is living in constant fear of returning to her father.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</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 temporary petition or Consent and Waiver of Notice or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. Orrin Fuller (father) b. Melissa (last name unknown)(mother). 	
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		<p>Reviewed by: KT</p> <p>Reviewed on: 5/5/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 20 - Fuller</p>		