

DOD: 07/19/96		<p>MINNIE MAYFIELD-JOHNSON, Administrator, is Petitioner.</p> <p>Account period: 07/19/96 – 12/31/13</p> <p>Accounting - \$52,023.67 Beginning POH - \$40,000.00 Ending POH - \$51,410.17</p> <p>Administrator - not addressed</p> <p>Attorney - not addressed</p> <p>Petitioner states that the estate is not in a position to be closed because the estate's real property has not been sold.</p> <p>Petitioner prays for an Order:</p> <ol style="list-style-type: none"> 1. Approving the First Account; and 2. Allowing additional time to close the estate pending the sale of the real property. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 03/06/14</u></p> <p>Note: A status hearing will be set as follows:</p> <ul style="list-style-type: none"> • Friday, 09/05/14 at 9:00 am in Dept. 303 for filing of the Final Account and Petition for Distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter, the status hearing will come off calendar and no appearance will be required.</p>	
Cont. from 030614				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input checked="" type="checkbox"/>	PTC			
<input checked="" 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			02/28/06
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202	n/a		
<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	n/a		
<p>Reviewed by: JF</p> <p>Reviewed on: 05/05/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1 – Mayfield</p>				

DOD: 7-17-07	MICHELLE SEYMOUR , Daughter, was appointed Administrator with Full IAEA without bond and Letters issued on 9-11-07.	NEEDS/PROBLEMS/COMMENTS: 1. Need petition for final distribution. <u>Note:</u> Attorney Moore states this is an estate with no assets; however, the report does not explain why there are no assets, and does not explain whether she has attempted to contact her client (due diligence). I&A filed 9-26-07 included real and personal property, and creditor's claims were filed; therefore, need accounting is necessary from the appointed fiduciary with all notices as required (including to creditors). See Probate Code §§ 12200, 10951, 11000, 1021, 1060, etc. <u>Note:</u> In addition to the accounting, formal Allowance or Rejection of the creditor's claims is required. See Probate Code §9250 and Mandatory Judicial Council Form DE-174. <u>Note:</u> The heirs of this estate are the decedent's four children: Annette Williams of Gulf Port, MS, Michelle Seymour of Ocean Springs, MS, Stephanie Mayfield of Pensacola, FL, and Albert Mayfield, Jr., of Elgin, TX.
Cont From 042514	The Administrator is a resident of Ocean Springs, Mississippi.	
Aff.Sub.Wit.		
Verified		
Inventory	Final I&A filed 9-26-07 indicates a total estate value of \$211,500.00 consisting of real property valued at \$210,000.00 and personal property.	
PTC		
Not.Cred.		
Notice of Hrg	Two Creditor's Claims were filed as follows:	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.	1) St. Agnes Medical Center \$887.75 2) Hematology Oncology Medical Group of Fresno \$3,512.00	
Pers.Serv.		
Conf. Screen	Nothing further was filed in this matter.	
Letters		
Duties/Supp	On 2-14-14, the Court set this status hearing for failure to file a petition for final distribution pursuant to Probate Code §12200 and sent notice to Attorney Moore and the Administrator.	
Objections		
Video Receipt		
CI Report		
9202		
Order	Unverified Status Report filed 4-17-14 by Attorney Moore states this is an estate with no assets. The attorney has prepared a "Petition by Attorney on Deferral of Filing Fee for Termination of Administration of Estate Having No Assets" awaiting the Court's determination on accepting the petition for filing. The attorney currently has two additional estates to be closed that were continued to 5-8-14. On 3-14-14, in connection with the Estate of Vanessa Jackson, Judge Oliver indicated that this matter could also be heard on 5-8-14. It is therefore requested that this hearing be continued to 5-8-14 for consideration of the deferral of filing fee to close this estate.	
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 5-5-14
		Updates:
		Recommendation:
		File 2 – Mayfield

Petition on Deferral of Filing Fee for Termination of Administration of Estate having No Assets and Discharge of Representative

DOD: 12/15/07	CONNIE R. VALLEJO , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		CONTINUED FROM 03/06/14
		As of 05/05/14, nothing further has been filed in this matter.
Cont. from 030614	Petitioner states:	
<input type="checkbox"/> Aff.Sub.Wit.	1. At the time Letters were issued, the estate consisted of cash in the amount of \$889.09, some items of personal property and real property on Los Altos in Clovis which was encumbered for more than its value.	
<input checked="" type="checkbox"/> Verified	2. On 11/19/09, the real property was lost to foreclosure.	
<input checked="" type="checkbox"/> Inventory	3. The cash in the estate was used to pay filing fees, publication and probate referee fees.	
<input checked="" type="checkbox"/> PTC	4. There remains costs and expenses of administration advanced by the petitioner's attorney in the amount of \$13.96.	
<input type="checkbox"/> Not.Cred.	5. There are 5 unsatisfied creditor's claims totaling \$7,206.77.	
<input checked="" type="checkbox"/> Notice of Hrg	6. There is no property on hand to pay any unreimbursed expenses of administration, attorney's fees or creditor's claims, nor is it expected any property will later be discovered to pay any of these expenses or claims.	
<input checked="" type="checkbox"/> Aff.Mail w/	7. There are no assets on hand to pay any court costs, and therefore Petitioner's attorney files this Petition on waiver or deferral of the filing fees to be paid to the court if any assets subsequently come into the estate.	
<input type="checkbox"/> Aff.Pub.		Reviewed by: JF
<input type="checkbox"/> Sp.Ntc.		Reviewed on: 05/05/14
<input type="checkbox"/> Pers.Serv.		Updates:
<input type="checkbox"/> Conf. Screen		Recommendation:
<input type="checkbox"/> Letters 02/27/08		File 3 – Raggio
<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		
	Petitioner requests that the court terminate the proceedings and discharge the Personal Representative.	

Atty Cobb, Lee S.W., of Chielpegian Law Offices (for Bradley William Anderson, Executor)

(1) First and Final Report on Status of Administration on Waiver of Account and (2) Petition for Final Distribution; (3) for Allowance of Ordinary Services by Attorney; (4) and for Reimbursement

DOD: 2/18/2013		BRADLEY WILLIAM ANDERSON , grandson and Executor, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. <i>Exhibit F, Computation of Statutory Compensation</i> indicates an incorrect statutory fee base for calculation of statutory fees. Total value of the Estate based upon the partial and full <i>Inventory and Appraisals</i> filed in this matter is \$428,387.43, resulting in a statutory fee of \$11,567.75. (Proposed order states in Paragraph 5(a) that \$647.94 cash remains in the estate, which may be interlineated with the correct amount of \$484.39 if Petitioner seeks to modify the statutory fee request.)</p>
		Accounting is waived.	
Cont. from		I & A — \$428,387.43	
<input type="checkbox"/>	Aff.Sub.Wit.	POH — [\$428,387.43] (\$13,765.24 is cash)	
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory	Executor — waives	
<input checked="" type="checkbox"/>	PTC	Attorney — \$11,404.20 (less than statutory of \$11,567.75)	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Costs — \$1,713.10 (deposited Will fee, filing fees, probate referee, publication, certified copies)	
<input checked="" type="checkbox"/>	Aff.Mail	W/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	Distribution pursuant to Decedent's Will is to:	
<input type="checkbox"/>	Conf. Screen	BRADLEY WILLIAM ANDERSON as Trustee of the MILDRED DYER LAUDER TRUST— \$647.94 cash,	
<input type="checkbox"/>	Letters 092613	U.S. Savings Bonds, and shares of stock.	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input checked="" type="checkbox"/>	Decl. Trust		
<input type="checkbox"/>	CI Report		
<input checked="" 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 checked="" type="checkbox"/>	FTB Notice		
		Reviewed by: LEG	
		Reviewed on: 5/5/14	
		Updates:	
		Recommendation:	
		File 4 - Lauder	

Atty Walters, Jennifer L. (for Julie Castillo and Connie Martinez – Petitioners)
 Atty Teixeira, J. Stanley (court appointed for proposed Conservatee Rosie Reyna)
 Atty Reyna, Joseph (Pro Per – Objector)

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

		TEMP DENIED 10-24-13	NEEDS/PROBLEMS/COMMENTS:
		JULIE CASTILLO and CONNIE MARTINEZ, Daughters, are Petitioners and request appointment as Co-Conservators of the Person with medical consent powers and dementia medication powers, and as Co-Conservators of the Estate without bond, funds blocked.	Court Investigator advised rights on 11-12-13
Cont. from 112113, 021314, 022014, 041014		Voting rights affected	Voting rights affected - Need minute order
<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		Minute Order 10-24-13 (Temp): Ms. Walters informs the Court that her client owes Rosie Reyna about \$3,000.00 which she is currently paying. Parties agree to participate in mediation today at 1:30 p.m. Parties are ordered not to speak ill of one another around Rosie Reyna. Mr. Teixeira is ordered to remain as counsel for Rosie Reyna. Based on the report of the investigator and everything that has been heard today, the Court denies the petition. The General Hearing remains set for 11/21/13. Petition is denied.
<input checked="" type="checkbox"/>	Aff.Mail	W	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv.	W	
<input checked="" type="checkbox"/>	Conf. Screen	X	
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input checked="" type="checkbox"/>	Objections		
<input checked="" type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	X	Minute Order 11-21-13: Status of Evaluation to be filed with the Court. Minute Order 2-13-14, 2-20-14: See additional pages. Update: Nothing further has been filed regarding the mediation appointment; however, a Capacity Declaration was filed on 4-2-14 and Joseph Reyna filed an Objection on 4-2-14.
<input type="checkbox"/>	Aff. Posting		The following issues remain: SEE ADDITIONAL PAGES
<input type="checkbox"/>	Status Rpt		Reviewed by: skc
<input type="checkbox"/>	UCCJEA		Reviewed on: 5-5-14
<input checked="" type="checkbox"/>	Citation		Updates:
<input type="checkbox"/>	FTB Notice		Recommendation:
		SEE ADDITIONAL PAGES	File 5 – Reyna

Page 2

Petitioners filed declarations in support of the petition from Bernardo Reyna (son), Julien Castillo (son-in-law), Paul Reyna (brother-in-law), Jonathan Martinez (grandson), Dorothy Martinez (family member), Harry Martinez (son-in-law), Cameron Martinez (grandson), Corina Martinez (granddaughter), Diane A. Frias (niece), Lydia Leong (family friend and former girlfriend of Joe), and Monica Estrada (granddaughter). See declarations for details.

Court Investigator Samantha Henson filed a report on 11-14-13.

Declaration of Attorney Lisa Horton filed 11-19-13 states that on 11-15-13, she was on the telephone with her client Julie Castillo who was standing in front of the proposed conservatee's residence attempting to visit with her mother. Attorney Horton heard Joseph Reyna yelling at Rosie and her clients through the phone, including yelling out, "They just want your money mom, don't let them in."

Status Report filed 2-11-14 by Petitioner Julie Castillo and Connie Martinez states the parties agreed Ms. Reyna would undergo evaluation to determine if she has suffered physical and/or verbal abuse. The psychologist was to be selected by mutual agreement of Stanley Teixeira and Petitioners' attorney. The parties agreed that Mr. Teixeira would oversee all known and existing accounts. Joseph Reyna was to supply him with statements and explanation of how funds are spent.

On 11-25-13, Mr. Teixeira provided a resume for a psychologist, who Petitioners feel lacks experience in dealing with dementia patients. On 1-2-14, Attorney Walters informed Mr. Teixeira of her concerns and requested additional resumes. To date, none have been received.

On 1-27-14, Attorney Walters spoke with Mr. Teixeira, who stated that he has not had any contact with his client or with Joseph Reyna for some time – he has tried calling and mail, but no response. This means that he has not reviewed any account information as anticipated.

Petitioners feel a conservator should be appointed immediately because:

- Rosie Reyna is still driving without a valid license
- Joseph Reyna is still driving her vehicles on a suspended license. He has been pulled over and vehicles impounded. He is allowing her to drive him everywhere in an attempt to avoid getting pulled over.
- Joseph Reyna is selling her personal property items to family members and possibly others
- Joseph Reyna has isolated Rosie Reyna by not allowing family to visit, or her counsel, and Rosie spent Thanksgiving and her birthday without her family.
- On Christmas she was found in her house sitting alone in the dark
- Sometime in December, Joseph Reyna took Rosie to EECU and tried to have all her funds withdrawn. The bank would not comply.
- Petitioners have tried to contact Rosie but Joseph picks up the phone and immediately hangs up or doesn't answer at all.

Petitioners believe it is in Rosie Reyna's best interest that a temporary conservator of her estate be appointed until a full settlement of this case or outcome of trial. Petitioners still request to be appointed; however, if the Court is not inclined to appoint Peitioners, Petitioners request appointment of the Public Guardian on a temporary basis.

Minute Order 2-13-13: Also present in the courtroom is Monica Estrada. Ms. Reyna objects to the conservatorship. Joseph Reyna is ordered to provide Mr. Teixeira anything he has regarding Ms. Reyna including any bank documents. Said documents are to be provided to Mr. Teixeira by the end of today. The Court will expect something to be filed regarding Bank of America before the next hearing. The Court orders Joseph Reyna to submit a declaration regarding the money, car, watch, and any reimbursement he has made to Ms. Reyna.

Page 3

Capacity Declaration was filed 4-2-14 by Attorney Teixeira.

Objection was filed 4-2-14 by Joseph Reyna.

See file for details.

Minute Order 2-20-14: Mr. Teixeira advises the Court that his client strongly objects to the conservatorship. The Court is informed that an agreement has been reached as to the mental health evaluator. Parties waive confidentiality so the Court can review the report. The Court authorizes the results to be distributed to the parties. Joseph Reyna is ordered to provide the Bank of America statements for the period of January 2012 through June 2013.

Minute Order 4-10-14: Joint request for continuance is granted. Continued to 5-8-14.

On 5-2-14, Attorney Teixeira (for Proposed Conservatee) filed a Declaration along with a Proof of Personal Service indicating service of the Report of Arlene Costa, LCSW, BCD, on Attorney Horton on 5-1-14. The declaration states that the parties agreed that Arlene Costa, LCSW, would serve as independent evaluator and on 2-20-14 the parties waived confidentiality so that the Court could review the report. The report is attached as Exhibit A.

Ms. Costa's report recommends appointment of the Public Guardian as Conservator of the Person and the Estate and that a full accounting be performed for the past 24 months, and arrangements made to repay any funds borrowed. This includes loans made to Ms. Castillo and withdrawals by Joseph Reyna. The report states that Ms. Reyna is happy with her son providing her daily care and continuing to live in her own home. The presence of the Public Guardian in an oversight role will provide reassurance that there is no verbal or emotional abuse occurring. The Public Guardian would oversee Joseph Reyna's care of his mother to put an end to the repeated APS reports of verbal and emotional abuse, and to monitor her for any changes that would indicate the need for a higher level of care.

Status Report Re: Bank Records and Status of Case filed 5-2-14 by Attorney Lisa Horton (for Petitioners) states Joseph Reyna was previously ordered to provide financial statements, etc., which were never provided. On 2-18-14, certain statements and misc. medical records were provided to Attorney Horton by Attorney Teixeira, and Joseph Reyna was again ordered to provide additional account statements. On 4-8-14, Attorney Horton received Joseph Reyna's declaration with additional statements and printouts (attached).

The report states that on 12-3-13, after this conservatorship action was commenced, Joseph Reyna took Mrs. Reyna to EECU and attempted to have all of her money withdrawn from one of her accounts. The EECU statement shows \$59,164.15 withdrawn and the deposited right back into the account. This is consistent with the statements made by Petitioner Julie Castillo that EECU did not allow the amount to be withdrawn. Petitioners are upset that he did this without any reasonable explanation. His declaration filed 2-20-14 stated that Attorney Teixeira had told him to move the money out of the bank; however, Mr. Teixeira states he did not tell him to do this. The Declaration provides analysis of the account statements provided. On 2-13-14, the Court ordered repayment of all amounts taken and for the impound fees because Joseph Reyna was driving without a license. According to the last statement, he has not done so. Further, his aggression toward the Petitioners has escalated and he continues to alienate their mother from the rest of the family.

NEEDS/PROBLEMS/COMMENTS:

- 1. If granted, need Confidential Supplemental Information Form GC-312. (This form provides information about the proposed Conservatee.)**
- 2. If granted, need bond of \$110,000.00 per Cal. Rules of Court 7.207 and Probate Code §2320(c)(4).**
- 3. Need order.**

Report of Sale and petition for Order Confirming Sale

DOD: 05/19/13		RORBERT C. OLSEN , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Sale Price - \$140,000.00	
		Overbid - \$147,500.00	
Cont. from		Reappraisal - \$140,000.00	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Property - 5276 E. Turner Fresno, CA 93727	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	Publication - Business Journal	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Buyer - Dale Rosado	
<input checked="" type="checkbox"/>	Aff.Mail	w/ Broker - \$5,600.00 (4% - payable to Sandra Reitz, Realty Stars)	
<input checked="" 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 checked="" type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: JF
			Reviewed on: 05/05/14
			Updates:
			Recommendation:
			File 6 - Padilla

Age:	TRINETTA JACKSON , Daughter, was appointed as Administrator with Full IAEA without bond and Letters issued on 7-25-06.	NEEDS/PROBLEMS/COMMENTS: 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. Note: A more current address was located for Administrator, Trinetta Jackson: 5575 E. Tulare #220, Fresno, CA 93727. A more current address was also located for beneficiary (Administrator's sister) Jacqueline Jackson: 7717 Ney Ave. Apt. C, Oakland, CA 94605
DOD:		
Cont. from 031414	Final Inventory and Appraisal filed 11-15-06 indicates a total estate value of \$270,000.00 consisting of real property.	
Aff.Sub.Wit.		
Verified		
Inventory	On 12-20-13, the Court set this status hearing for failure to file a petition for final distribution and sent notice to Attorney Susan Moore.	
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail	Status report filed 3-6-14 by Attorney Susan Moore states the property was foreclosed and the Administrator has moved leaving no forwarding address. All mail has been returned undeliverable. Ms. Moore attempted to contact the Administrator by mail on 12-18-07 and received no response. She has tried to locate her by cell phone, but the number is no longer hers. Ms. Moore states she has not had any contact with persons interested in this estate since the property was lost to foreclosure. There are no assets. The attorney states she has attempted to file a "Petition by Attorney on Deferral of Filing Fee for Termination of Administration of Estate Having No Assets" however her petition has not been accepted for filing without fees or fee waiver. Since the attorney cannot locate her client and has no estate funds to pay the filing fee, she is unable to close the estate unless a deferral is granted.	
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	Unverified Status Report filed 4-17-14 states the attorney has attempted to file a <u>Petition by Attorney on Deferral of Filing Fee for Termination of Administration of Estate Having No Assets</u> awaiting the Court's determination on accepting the document for filing.	

Reviewed by: skc

Reviewed on: 5-5-14

Updates:

Recommendation:

File 7 – Jackson

DOD: 12-21-05	<p>KAMALJIT K. ASHAT, Surviving Spouse, is Petitioner.</p> <p>Petitioner was appointed Administrator of the Estate of Sukhjinder Ashat on 2-10-09.</p> <p>Decedent died intestate</p> <p>Petitioner requests Court confirmation that Petitioner's 50% community property interest in certain real property on Blackstone Ave., in Fresno belongs to her.</p> <p>Petitioner states she and the decedent acquired the subject property with the earnings and accumulations from said earnings during their marriage; therefore, the property constituted community property of the spouses. Title stands in the decedent's name alone because he purchased the property, with Petitioner's consent, while she was on vacation out of the country and was unavailable to sign purchase and loan documents. The property was reported on the joint income tax returns of the spouses as their community property.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: This Spousal Property Petition was filed as a new case 14CEPR00234; however, at the hearing on 4-28-14, it was ordered consolidated with the existing estate case 08CEPR00834.</p> <p>Note: Page 8B of this calendar is the continued status hearing regarding filing the petition for final distribution</p> <p>Note: There were no appearances at the hearing on 4-28-14. The following issues remain noted for consideration:</p> <ol style="list-style-type: none"> 1. Petitioner states the property was acquired during the marriage with community property funds; however, Petitioner does not provide details such as the date of the marriage, the date the property was acquired, etc. The Court may require further information. 2. It appears from the Notice of Hearing that Mrs. Ashat has moved to Roseville, CA. Need Notice of Change of Address (Form MC-040) to be filed in 08CEPR00834.
Cont. from 042814		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>Reviewed by: skc</p> <p>Reviewed on: 5-6-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 8A - Ashat</p>	

Probate Status Hearing Re: (1) Failure to File Inventory & Appraisal; (2) Failure to File a First Account or Petition for Final Distribution [Prob. C. 12200, et seq.]

DOD: 12/21/2005	<p>KAMLJIT K. ASHAT, surviving spouse, was appointed as Administrator with full IAEA authority and without bond on 2/10/2009.</p> <p>At the time of the filing of the Petition for Probate the estate was estimated to be \$2,761,000.00.</p> <p>The decedent died intestate survived by his spouse and three children, one of which is a minor.</p> <p>Inventory and appraisal was due July 2009.</p> <p>First account or a petition for final distribution was due April of 2010.</p> <p>Notice of Status Hearing was mailed to attorney William Cowin on 12/19/2012.</p> <p>Minute order dated 9/12/13 stated the Court imposes court sanctions to both Attorney William Corwin and Administrator in the amount of \$500 each.</p> <p>Status Report filed on 12/11/13 states Attorney Corwin has retained the services of Jill Spaulding to assist his office with the completion of the probate now that all litigation has been resolved.</p> <p>Steven Diebert completed the property appraisal in late November.</p> <p>Ms. Spaulding has recently completed the filings with the Franchise Tax Board. Ms. Spaulding informed Mr. Corwin that the Franchise Tax Board is now taking up to four months for completion.</p> <p>Accordingly, Mr. Corwin requests the Court continue this status hearing until sometime during the month of May 2014.</p>	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Continued from 12/19/13. As of 5/5/14 the following issues remain:</p> <ol style="list-style-type: none"> 1. Need Inventory and Appraisal, and first account or petition for final distribution <p><u>Update:</u> Final Inventory and Appraisal filed 1/8/14 indicates a total estate value of \$65,000.00, which consists of the decedent's ½ community property interest in the real property on Blackstone.</p> <p>However, the petition originally estimated the value of the estate at \$2,761,000.00.</p> <p>The Court may require clarification as to the discrepancy between the estimate and the Final I&A value.</p> <ol style="list-style-type: none"> 2. Need payment of sanctions in the sum of \$500 for Mr. Corwin and \$500 for Ms. Ashat. See Minute Order 9-12-13.
Cont. from 022213, 032213, 051013, 053113, 071913, 081613, 091213, 101713, 121913		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>Reviewed by: KT</p> <p>Reviewed on: 5/5/14</p> <p>Updates: 5/6/14 (skc)</p> <p>Recommendation:</p> <p>File 8B - Ashat</p>	

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

DOD: 02/21/14	J. CHARLES HOWE , son, is Petitioner and requests appointment as Administrator with full IAEA and without bond.	NEEDS/PROBLEMS/COMMENTS: Note: If the petition is granted status hearings will be set as follows: <ul style="list-style-type: none"> • Wednesday, October 8, 2014 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Wednesday, July 8, 2015 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter, the status hearing will come off calendar and no appearance will be required.
Cont. from	Full IAEA – OK	
<input type="checkbox"/> Aff.Sub.Wit.	All heirs waive bond	
<input checked="" type="checkbox"/> Verified	Decedent died intestate	
Inventory	Residence: Kingsburg Publication: Selma	
PTC	Enterprise/Kingsburg Recorder	
Not.Cred.	Estimated Value of the Estate: Personal property - \$1,900,000.00	
<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		
Objections		
Video Receipt		
CI Report		
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Reviewed by: JF
Reviewed on: 05/05/14
Updates: 05/05/14
Recommendation: SUBMITTED
File 9 - Beard

DOD: 02/03/14		<p>JEFFREY P. WEIGANT and SANDRA WEIGANT COWPERTHWAITE, children of decedent/named co-executors without bond, are Petitioners.</p> <p>Full IAEA – OK</p> <p>Will dated 05/18/05</p> <p>Residence: Fresno Publication: The Business Journal</p> <p>Estimated Value of the Estate: Personal property - \$ 5,000.00 Real property - 247,000.00 Total - \$252,000.00</p> <p>Probate Referee: STEVEN DIEBERT</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Both Petitioners/named Executors without bond reside outside the State of California. The Will devises the estate assets to a Trust. It is unknown who the beneficiaries of the trust are.</p> <p>The court may require bond if the proposed personal representative resides outside California or for other good cause, even if the will waives bond, pursuant to California Rules of Court 7.201(b) and Probate Code 8571.</p> <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Wednesday, October 8, 2014 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Wednesday, July 8, 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>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit. s/p		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/		
<input checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: JF	
		Reviewed on: 05/05/14	
		Updates:	
		Recommendation:	
		File 10 - Weigant	

Petition to Establish Fact, Date, and Place of Marriage

		<p>MARIO CHAVEZ and ARMINDA CHAVEZ, are Petitioners.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Petitioners do not state that they obtained a marriage license for the 01/18/92 ceremony. Family Code §§ 420 et seq., states that before solemnizing a marriage, the officiant shall require the presentation of the marriage license, and that upon solemnizing the marriage, the officiant shall return the endorsed marriage license to the county recorder within 10 days after the ceremony. Need Order. <p>If a valid license was not obtained, need authority for Court order establishing fact of marriage.</p>
		<p>Petitioners state that they were initially married on 01/02/87. That marriage was recorded with the Fresno County Clerk on 01/05/87. Subsequent to the marriage, Mario discovered that he was not divorced from his previous wife, Cecilia Misquez. Mario and Cecilia filed a Joint Petition for Summary Dissolution of Marriage and on 03/22/88, the Fresno Superior Court entered a Final Judgment of Dissolution of Marriage. Mario and Arminda renewed their wedding vows on 01/18/92. Petitioners were ignorant to the fact that the initial marriage on 01/02/87 was invalid until they discovered that their marriage was not valid in February 2014.</p>	
Cont. from		<p>Petitioners request the Court to acknowledge the facts, date and place of the marriage ceremony on 01/18/92 as the actual true record of the marriage of Arminda Chavez and Mario Chavez. The ceremony was officiated by Father Francis Tasy at St. Anthony of Padua Church in Reedley. The ceremony was witnessed by Marcos Perez and Sylvia Perez.</p>	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	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: JF</p> <p>Reviewed on: 05/05/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11 - Chavez</p>

Probate Status Hearing for Failure to File the First Account or Petition for Final Distribution

DOD: 2/2/1998	<p>DIANE WINNING was appointed Executor of the estate with full IAEA authority and with bond set at \$7,000.00 on 12/10/2002.</p> <p>Bond filed on 12/16/2002.</p> <p>Letters issued on 12/16/2002.</p> <p>I & A filed on 5/9/2003 showing an estate valued at \$49,899.33.</p> <p>Petition for final distribution was due 12/2003.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need petition for final distribution <u>or</u> current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Cont. from 120613, 030614		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 5/5/14
		Updates:
		Recommendation:
		File 12 - Brockway

Atty Matthai, Edith (for Craig A. Houghton – Objector)

Atty Manock, Charles K. (for George Salwasser/Executor of the Estate of Lillian Salwasser)

Atty Chielpegian, Michael S (for Marvin Salwasser/Administratoor with Will Annexed of Walter Salwasser Respondent)

Atty Wright, Janet L. (for George Salwasser/Executor)

Atty Farley, Michael L. (of Visalia, for Gary E. Salwasser - Beneficiary)

Status Hearing

	George Salwasser is Executor.	NEEDS/PROBLEMS/COMMENTS:
	An Amended and Restated First Account was filed on 1-13-10 and has been continued with reference to additional ongoing matters in this and other related cases.	Status Report filed 8-7-13 states an amended tax return is being prepared and will be submitted to the IRS upon completion by Craig Houghton of Baker Manock & Jensen. At this time, Mr. Houghton is still not in possession of sufficient information in regards to the amended tax matters to provide Ms. Wright with the information needed to close the estate. It is requested that the status hearing be continued to 10-4-13.
	This status hearing was set on 4-26-13.	Status Report filed 1-8-14 requests at least an additional 45 days.
Cont. from 060713, 080913, 100413, 011014, 041014	Status report filed 6-6-13 by Attorney Janet Wright states counsel met and conferred on 5-16-13 with attorneys Craig Houghton and Mark Poochigian of Baker Manock & Jensen, who represented the Executor in his initial appointment through December 2008, and in various extraordinary matters, and with Executor, to review the proposed Petition for Final Distribution on Waiver of Account.	Minute Order 1-10-14 states Ms. Wright requests a 90-day continuance.
Aff.Sub.Wit.	It was determined that in order to close the estate pursuant to the Memorandum of Settlement Agreement entered into by beneficiaries Gary Salwasser and George Salwasser after mediation, certain matters would need to be addressed:	Status Report filed 4-8-14 requests an additional 30 days.
Verified	<ol style="list-style-type: none"> 1. Amendment to estate tax return 2. Inventory and Appraisal for promissory notes (preliminary payment history attached) 	Minute Order 4-10-14 continued the matter to 5-8-14.
Inventory	Once the amendment to the estate tax return is completed, it should be possible to create a formula taking into account the allocation of fees and costs pursuant to the agreement and any credits due beneficiaries which would allow the petition to be filed and estate to be closed.	As of 5-5-14, nothing further has been filed.
PTC	Counsel is developing a draft formula and will meet and confirm with counsel for Gary Salwasser as well as Baker Manock & Jensen. If a formula cannot be agreed upon, the Petition will be filed specifying the areas of dispute.	1. Need amended account / petition for final distribution.
Not.Cred.		Reviewed by: skc
Notice of Hrg		Reviewed on: 5-5-14
Aff.Mail		Updates:
Aff.Pub.		Recommendation:
Sp.Ntc.		File 13 – Salwasser
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Probate Status Hearing Re: Failure to File a First Account or Petition for Final Distribution [Prob. C. 12200, et seq.]

<p>DOD: 01/23/11</p>	<p>LESLEY WAGNER and MEAGAN WAGNER, were appointed Co-Administrators with Full IAEA and without bond on 07/26/11. Letters of Administration were issued on 07/27/11.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 03/06/14</p>
<p>Cont. from 042613, 072613, 111513, 030614</p>	<p>Inventory & Appraisal, Partial No. 1 filed 02/15/13 - \$210,000.00</p>	<p>1. Need First Account and/or Petition for Final Distribution.</p>
<p>Aff.Sub.Wit.</p>	<p>Notice of Status Hearing filed 03/01/13 set this matter for status regarding filing of the Accounting and/or Petition for Distribution.</p>	<p>Note: Notice of Proposed Action filed 03/28/14 regarding sale of real property in Fowler, CA.</p>
<p>Verified</p>	<p>Clerk's Certificate of Mailing states that a copy of the Notice of Status Hearing was mailed to attorney Janet Wright on 03/01/13.</p>	
<p>Inventory</p>	<p>Second Status Report of Counsel for Lesley Wagner and Meagan Wagner filed 11/14/13 states: the Inventory & Appraisal, Partial #1 filed 02/15/13 reports the value of the decedent's personal residence. The residence appears to be the sole asset of the estate. Two Creditor's Claims have been timely filed in this matter: Citibank in the amount of \$10,580.79; and West Asset Management (for Bank of America) in the amount of \$11,264.98. The decedent's residence is presently occupied by the decedent's surviving spouse, Virginia Wagner. After exploring alternative options for satisfying the two creditor's claims, it appeared that sale of the residence was the only means by which the estate would have sufficient funds to satisfy the two creditor's claims and be in a position to close and distribute the estate. The residence is currently on the market, but has not been sold, however there is currently a potential serious buyer who is seeking financing. The Co-Administrators estimate that it will take another 30-90 days to finalize the sale of the residence. A Continuance to 02/14/14 is requested to allow the sale of the property and the Petition to Close and Distribute the Estate to be prepared and filed.</p>	<p>Reviewed by: JF</p>
<p>PTC</p>	<p>Third Status Report of Counsel for Co-Administrators Lesley Wagner and Meagan Wagner filed 03/05/14 states: there is currently a sale pending of the sole asset of the estate. Escrow is due to close as soon as the noticing period for the Notice of Proposed Action expires on 03/14/14. With the sale of the real property, the estate will be in a position to be closed. After the close of the sale of the property, the estate will be in a position to close. The Administrators believe it will be feasible to prepare the First and Final Account and Petition to Distribute the Estate within 60 days and a continuance is requested.</p>	<p>Reviewed on: 05/05/14</p>
<p>Not.Cred.</p>		<p>Updates:</p>
<p>Notice of Hrg</p>		<p>Recommendation:</p>
<p>Aff.Mail</p>		<p>File 14 – Wagner</p>
<p>Aff.Pub.</p>		
<p>Sp.Ntc.</p>		
<p>Pers.Serv.</p>		
<p>Conf. Screen</p>		
<p>Letters</p>		
<p>Duties/Supp</p>		
<p>Objections</p>		
<p>Video Receipt</p>		
<p>CI Report</p>		
<p>9202</p>		
<p>Order</p>		
<p>Aff. Posting</p>		
<p>Status Rpt</p>		
<p>UCCJEA</p>		
<p>Citation</p>		
<p>FTB Notice</p>		

Atty LeVan, Nancy J., sole practitioner (for Petitioner Gary Morris, Jr., Beneficiary)

Status Hearing Re: Filing of the Proof of Bond for Senior Trust

DOD: 10/19/2013		<p>GARY MORRIS, JR., son and Beneficiary, filed a <i>Petition for Appointment of Successor Trustee</i> on 12/19/2013.</p> <p><i>Order Approving Petition for Appointment of Successor Trustee of the Gary F. Morris, Sr., 2013 Trust</i> filed 4/1/2014 appoints WALTER ALBERT MORRIS as Successor Trustee of the Trust, and finds bond shall be filed by the Successor Trustee in an amount to be determined following filing of inventory and appraisal. Status Hearing Re filing proof of bond is set for 5/8/2014.</p> <p><i>Order Setting Bond Amount</i> was filed 4/25/2014, finding the bond amount for WALTER ALBERT MORRIS, Successor Trustee of the Trust, is set at \$286,000.00.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of bond in the sum of \$286,000.00 to be filed with the Court.</p>
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
Bond	X		
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: LEG	
		Reviewed on: 5/6/14	
		Updates:	
		Recommendation:	
		File 15 - Morris	

Pro Per DeGeorge, Lois (Pro Per Petitioner, Executor)
 Atty Markeson, Thomas A., of Wild Carter & Tipton (for Valley Stairway, Inc.; Jerry DeGeorge; and Anthony DeGeorge, Jr.)

(1) First and Final Petition and Report of Executor (2) for Final Distribution

DOD: 9/3/2005		<p>LOIS MARIE DeGEORGE, spouse and Executor appointed on <u>7/25/2006</u> with Full IAEA authority without bond, is Petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Minute Order dated 3/7/2014 from the Probate Status Hearing Re: Failure to File Inventory and Appraisal; Failure to File a First Account or Petition for Final Distribution states Ms. Istanbulian is appearing specially for Attorney Joanne Sanoian. Ms. DeGeorge informs the Court that Ms. Sanoian is no longer representing her. Ms. DeGeorge is directed to see to it that a substitution of attorney is filed indicating that she is now self-represented. Based on a no asset estate, the Court waives the fees.</p> <p>Note: Court records do not show a <i>Final Inventory and Appraisal</i> has been filed in this estate pursuant to Probate Code § 8800(b), to inform the Court of any assets that may have been marshalled by the Executor.</p> <p>~Please see additional page~</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.	<p>Account period: not stated [7/25/06 – 4/1/14] Petition does not state the account period pursuant to Probate Code § 1061 (a). However, based upon this atypical case characterized by lapse of time with few administrative actions taken and the simplified accounting presented, the account period may be presumed to be from the date of appointment and/or date Letters issued, to the date of the execution and verification of this accounting.</p> <p>Accounting - \$ not stated Beginning POH - \$ not stated Ending POH - \$ not stated</p> <p>Executor - waives</p> <p>Petitioner states:</p> <ul style="list-style-type: none"> An Inventory and Appraisal has not been filed with this Court; No actions were taken under Independent Administration of Estates Act (IAEA); The heirs under Decedent's Will are JOSEPH DeGEORGE, grandson, and LISA M. FARMEN, granddaughter; On 11/17/2006, the Executor paid \$100,000.00 to Joseph DeGeorge and \$100,000.00 to Lisa M. Farmen from the Trust of the Decedent; Executor received no fee for these distributions; Executor is not asking for compensation. <p>Petitioner prays for an Order of this Court that:</p> <ol style="list-style-type: none"> The administration of the Estate be brought to a close; and The <i>First and Final Petition and Report of Executor for Final Distribution</i> be approved. 	
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		X
<input type="checkbox"/>	PTC		X
<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 checked="" 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 checked="" type="checkbox"/>	FTB Notice		
		<p>Reviewed by: LEG</p> <p>Reviewed on: 5/5/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 16 – DeGeorge</p>	

NEEDS/PROBLEMS/COMMENTS, continued:

1. Court records do not show notice of the *First and Final Petition and Report of Executor for Final Distribution* has been served to any of Decedent's heirs as mentioned in Decedent's Will, as listed in the initial *Amended Petition for Probate* filed 5/22/21006, nor as are mentioned in the instant *First and Final Petition and Report*. Need *Notice of Hearing of the Petition for Final Distribution on Waiver of Accounting, and proof of mailed service of 15 days' notice prior to hearing pursuant to Probate Code §§ 1220, 11000 and 11601* for the following persons:
 - Anthony DeGeorge, Jr., son;
 - Jerome (Jerry) DeGeorge, son;
 - Joseph A. DeGeorge, grandson;
 - Lisa Marie Farmen, granddaughter;
 - TRUSTEE of the ANTHONY DeGEORGE REVOCABLE LIVING TRUST AGREEMENT dated 5/13/1997, as Amended by FOURTH AMENDMENT thereto dated 8/24/2011.
2. Need proposed order pursuant to Local Rule 7.1.1(F) providing that a proposed order shall be submitted with all pleadings that request relief.

Notes Re Distribution: *First and Final Petition and Report of Executor for Final Distribution* does not comply with the provisions for estate accountings pursuant to Probate Code §§ 1061 et seq. The following notes are provided for the Court's consideration with respect to approval of the *Petition*:

- Petitioner states under the heading "*Distribution of Estate*" that she distributed a total of **\$200,000.00** to two of Decedent's heirs from the Trust of Decedent, which is a violation of the Probate Code provisions requiring Court order authorizing distribution of estate assets. It appears Petitioner marshalled estate assets, based upon the statement that assets were distributed.
- It is unclear from the *Petition* whether Petitioner served or currently serves as Trustee of the Trust of the Decedent, though as Executor of the Estate she is responsible for distributing to the beneficiary in Decedent's Will, namely the TRUSTEE of the **ANTHONY DeGEORGE REVOCABLE LIVING TRUST AGREEMENT dated 5/13/1997**, as Amended by **FOURTH AMENDMENT thereto dated 8/24/2011**, and not directly to the two persons named in the *Petition*, who may be beneficiaries of the Decedent's Trust, but who are not identified as such in the instant *Petition*.

Notes Re Case History:

- Lois DeGeorge (represented by Attorney John Fennacy) filed on 5/9/2006 a *Petition for Probate* seeking appointment as Executor of Decedent's Will dated 7/18/2002. *Amended Petition for Probate* was filed on 5/22/2006. *Order for Probate* appointing Lois DeGeorge as Exeuctor was filed 7/25/2006, and *Letters* issued on that date.
- Lois DeGeorge (in pro per) filed on 4/3/2007 a *Petition for Order Compelling Central Valley Community Bank to Produce Documents*. *Minute Order* dated 5/7/2007 states in pertinent part that Jan Boman personally appeared on behalf of Central Valley Community Bank. Ms. Boman reported that Anthony DeGeorge has no assets at the bank as owner or beneficiary since 2002. *Petition* dismissed without prejudice.
- Lois DeGeorge (represented by Attorney Joanne Sanoian) filed on 2/16/2010 a *Petition to Determine Title to and Require Transfer of Personal Property to Estate of Decedent*. Following litigation including demurrer by attorneys for Jerome (Jerry) DeGeorge and Anthony DeGeorge, Jr., the Court issued on 7/19/2010 an *Order Dismissing Petition to Determine Title to and Require Transfer of Personal Property to Estate of Decedent*.

~Please see additional page~

NEEDS/PROBLEMS/COMMENTS, continued:

Notes Re Case History, continued:

- Lois DeGeorge (represented by Attorney Joanne Sanoian) filed on 7/23/2010 a *First Amended Petition to Determine Title to and Require Transfer of Personal Property to Estate of Decedent*, culminating in an *Order Dismissing Petition filed July 23, 2010* [by Lois DeGeorge to determine title to estate property], which was entered on 1/3/2011, thereby serving as the end to the litigation that had been ongoing since 2006.

Atty Rios, Grace (pro per – non-relative/Petitioner)

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

Matthew, 3	TEMPORARY EXPIRES 05/08/14	NEEDS/PROBLEMS/COMMENTS:
	GRACE RIOS , non-relative, is Petitioner.	CONTINUED FROM 03/13/14
	Father: JASON ROMERO	Minute Order from 03/13/14 states: Mr. Romero is directed to provide his contact information to the Clerk's Office forthwith. The temporary is extended to 05/08/14.
Cont. from 031314	Mother: ROSEANNA ORTIZ – Consent & Waiver of Notice filed 01/10/14	As of 05/05/14, nothing further has been filed.
<input type="checkbox"/> Aff.Sub.Wit.	Paternal grandparents: NOT LISTED	<p>This Petition pertains to Matthew Ortiz only. Guardianship of Alyssa & Alfredo was granted on 05/23/12 to Elsa Garcia, paternal aunt. Guardianship of Jaylen & Augustin was granted on 05/23/12 to Guadalupe Garcia Villagomez, paternal aunt.</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person or Consent & Waiver of Notice or Declaration of Due Diligence for: <ol style="list-style-type: none"> a. Jason Romero (father) – Personal service required b. Paternal grandparents – service by mail sufficient c. Maternal grandparents – service by mail sufficient
<input checked="" type="checkbox"/> Verified	Maternal grandparents: NOT LISTED	
<input type="checkbox"/> Inventory	Petitioner states that Matthew's mother left him with her when he was 3 months old and she has raised him since that time. The parents both have a history of substance abuse. Petitioner states that Matthew's father is now threatening to remove Matthew from her home. Petitioner states that hers is the only home Matthew knows and he would be devastated to be removed from the only family he knows. Petitioner states that the father is a complete stranger to Matthew. Petitioner states that the father is currently in a drug program, has only been clean for 6 months and has a history of going back to drugs after completing programs.	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting	DSS Social Worker Irma Ramirez filed a report on 03/12/14.	Reviewed by: JF
<input type="checkbox"/> Status Rpt		Reviewed on: 05/05/14
<input checked="" type="checkbox"/> UCCJEA		Updates:
<input type="checkbox"/> Citation		Recommendation:
<input type="checkbox"/> FTB Notice		File 17 – Ortiz & Leon

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

Age: 35	<u>NO TEMPORARY REQUESTED</u>		NEEDS/PROBLEMS/COMMENTS:
	<p>ELENA L. LAMBERT, cousin, is petitioner and requests appoint as Conservator of the person, with medical consent powers.</p>		<p>Court Investigator Advised Rights on 04/25/2014</p> <p>1. Need proof of service at least fifteen (15) days prior to the hearing of Notice of Hearing with a copy of the Petition for Appointment of Conservatorship for:</p> <ul style="list-style-type: none"> Paternal Grandparents (Unknown)
Cont. from	<p>Declaration of Dr. Priyanka filed 03/27/2014 supports request for medical consent.</p>		
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	w/		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input checked="" type="checkbox"/> Pers.Serv.			
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections	<p>Court Investigator Jennifer Young's report filed 05/01/2014.</p>		
<input checked="" type="checkbox"/> Video Receipt			
<input checked="" type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input checked="" type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed by: LV
			Reviewed on: 05/05/2014
			Updates:
			Recommendation:
			File 19 - Keys

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

DOD: 08/28/2013	BETH MCMASTER, KATHY COVER, MICHAEL MCMASTER, MATT MCMASTER, and MARK MCMASTER, children, are petitioners.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Attachment 11 does not provide the decedent's interest in the real property. #7 of the petition regarding other proceedings was not answered. #9a(3) or #9a(4) was not answered regarding registered domestic partner. #9a(5) or #9a(6) was not answered regarding children.
	40 days since DOD	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory		
PTC		
Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	I&A - \$125,000.00	
<input checked="" type="checkbox"/> Aff.Mail	w/ Decedent died intestate	
Aff.Pub.	Petitioners request Court determination that decedent's interest in real property located at 4663 E. Cornell, Fresno, Ca. pass to 20% to Beth McMaster, 20% to Kathy Cover, 20% to Michael McMaster, 20% to Matt McMaster and 20% to Mark McMaster pursuant to intestate succession.	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 05/06/2014
		Updates:
		Recommendation:
		File 20 - Chasen

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

		NO TEMP REQUESTED	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator advised rights on 4-9-14</p> <p>Voting rights affected – need minute order.</p> <p>1. Need video receipt from both petitioners per Local Rule 7.15.8.</p>
		<p>GLORIA ROMERO and APOLINAR SANCHEZ, Parents, are Petitioners and request appointment as Co-Conservators of the Person with medical consent powers.</p> <p>Voting rights affected</p> <p>A Capacity Declaration was filed 4-2-14.</p> <p>Petitioners state the proposed Conservatee is diagnosed with cerebral palsy and is fully disabled. He is wheelchair bound, does not speak, suffers from hearing loss and mental retardation. The proposed Conservatee attends high school special education classes. His cognitive abilities are believed to be that of about an 8-10-year-old child. He attends rehabilitation therapy through CVRC.</p> <p>Court Investigator Charlotte Bien filed a report on 4-15-14.</p>	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt	X	
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	Citation		
	FTB Notice		
			<p>Reviewed by: skc</p> <p>Reviewed on: 5-5-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 21 – Romero-Sanchez</p>