



## ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

**1 Edna Mildred Carlson (Estate)**

**Case No. 06CEPR00038**

**Atty Kruthers, Heather H. (for Petitioner/Administrator Public Administrator)**

**(1) First and Final Account and Report of Administration and (2) Petition for Allowance of Ordinary and Extraordinary Commissions and Fee and for (3) Distribution [Prob. C. 10800, 10810, 10951, 11600, 11850(a)]**

<b>DOD: 12/1/2005</b>		<b>PUBLIC ADMINISTRATOR</b> , Administrator, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Account period: 12/1/2005 – 5/31/2011	<p>1. This estate is the beneficiary of the Frances L. Carlson Living Trust (page 2 of this calendar). Disbursement schedule includes a disbursement for Home Insurance 9/26/08 - 3/26/08 in the amount of \$1,985.15. The disbursement schedule in The Frances L. Carlson Living Trust includes a disbursement for House Insurance (same property) 9/29/08 – 9/26/09 in the amount of \$1,987.07. It appears that these payments are for the same time frame and could be a duplicate charge.</p>
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Accounting - <b>\$96,903.42</b>	
<input checked="" type="checkbox"/>	<b>Verified</b>	Beginning POH - <b>\$81,147.20</b>	
<input checked="" type="checkbox"/>	<b>Inventory</b>	Ending POH - <b>\$40,170.48</b>	
<input checked="" type="checkbox"/>	<b>PTC</b>	Administrator - <b>\$3,868.72</b> (statutory)	
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>	Administrator X/O - <b>\$445.20</b> (per Local	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Rule for sale of personal property and	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	preparation of taxes) W/	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>	Attorney - <b>\$3,868.72</b> (statutory)	
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>	Bond fee - <b>\$1,332.43</b> (ok.)	
<input checked="" type="checkbox"/>	<b>Letters</b>	5/10/06 Court fees - <b>\$342.00</b> (filing fee	
<input type="checkbox"/>	<b>Duties/Supp</b>	and certified copies)	
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>	Closing reserve - <b>\$1,500.00</b>	
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>	Will devises the estate to Decedent's Living	
<input checked="" type="checkbox"/>	<b>Order</b>	Trust. Petitioner requests the authority to	
<input type="checkbox"/>	<b>Aff. Posting</b>	distribute to directly to the beneficiaries of	
<input type="checkbox"/>	<b>Status Rpt</b>	the trust, rather than requiring the opening of	
<input type="checkbox"/>	<b>UCCJEA</b>	a trust case merely for distribution.	
<input type="checkbox"/>	<b>Citation</b>	<b>Proposed distribution is to:</b>	
<input checked="" type="checkbox"/>	<b>FTB Notice</b>	<b>John G. Serbien, Director of Planned Giving</b>	
		<b>University of Redlands</b>	
		- \$14,208.71	
		<b>Beta-Sigma-Phi</b> - \$14,208.70	
			<b>Reviewed by: KT</b>
			<b>Reviewed on: 5/7/12</b>
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 1 - Carlson</b>

**(1) First and Final Account and Report of Trustee, (2) Petition for Allowance of Compensation to Trustee and Attorney, (3) Final Distribution (Prob. C. 15688, 16062, 16063)**

	<b>PUBLIC ADMINISTRATOR</b> , Trustee, is petitioner.		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. This beneficiary of this estate is the Frances L. Carlson Living Trust (page 1 of this calendar). Disbursement schedule includes a disbursement for Home Insurance 9/29/08 – 9/26/09 in the amount of \$1,987.07 . The disbursement schedule in the Estate of Edna Mildred Carlson includes a disbursement for House Insurance 9/26/08 -3/26/08 in the amount of \$1,985.15 (same property). It appears that these payments are for the same time frame and could be a duplicate charge.</p>
	Account period: 9/8/2006 – 5/15/2011		
	Accounting - <b>\$105,009.21</b>		
	Beginning POH - <b>\$90,058.39</b>		
	Ending POH - <b>\$75,563.18</b>		
<b>Cont. from</b>	Trustee - <b>\$3,947.11</b> (statutory)		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Trustee X/O - <b>\$1248.00</b> (per Local Rule for sale of real property and preparation of taxes.)		
<input checked="" type="checkbox"/> <b>Verified</b>	Attorney - <b>\$3,947.11</b> (statutory)		
<input type="checkbox"/> <b>Inventory</b>	Bond - <b>\$1,181.34</b>		
<input type="checkbox"/> <b>PTC</b>	Court fees - <b>\$320.00</b> (filing fee)		
<input type="checkbox"/> <b>Not.Cred.</b>	Petitioner states pursuant Decedent's Trust, her sister Edna Carlson, was to receive the assets if she survived. Edna did survive her sister, but she died soon after. Thus, Edna's estate is entitled to receipt of the trust assets. Frances and Edna executed identical Wills and Trusts, naming each other as beneficiaries, and the same two entities. Since Petitioner would be distributing this Trust to Edna's estate to thereby distribute to the two beneficiaries, Petitioner requests authority to distribute directly to the two successor beneficiaries.		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	<b>Proposed distribution is to:</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b> W/	<p><b>John G. Serbien, Director of Planned Giving University of Redlands</b></p> <p>- \$31,512.32</p> <p><b>Beta-Sigma-Phi</b> - \$31,512.32</p>		
<input type="checkbox"/> <b>Aff.Pub.</b>			
<input type="checkbox"/> <b>Sp.Ntc.</b>			
<input type="checkbox"/> <b>Pers.Serv.</b>			
<input type="checkbox"/> <b>Conf. Screen</b>			
<input type="checkbox"/> <b>Letters</b>			
<input type="checkbox"/> <b>Duties/Sup p</b>			
<input type="checkbox"/> <b>Objections</b>			
<input type="checkbox"/> <b>Video Receipt</b>			
<input type="checkbox"/> <b>CI Report</b>			
<input type="checkbox"/> <b>9202</b>			
<input checked="" type="checkbox"/> <b>Order</b>			
<input type="checkbox"/> <b>Aff. Posting</b>			
<input type="checkbox"/> <b>Status Rpt</b>			
<input type="checkbox"/> <b>UCCJEA</b>			
<input type="checkbox"/> <b>Citation</b>			
<input type="checkbox"/> <b>FTB Notice</b>			
			<b>Reviewed by: KT</b>
			<b>Reviewed on: 5/8/12</b>
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 2 - Carlson</b>

(1) Second Account and Report of Co-Conservators, Petition to Settle Account, an  
(2) for Allowance of Attorney's Fees (Prob. C. 1064, 2640)

Age: 86 years DOB: 6/30/1925	<b>RENEE DAUER</b> , granddaughter and Co-Conservator of the Person, <b>and MARJORIE DAUER-PIPER</b> , granddaughter and Co-Conservator of the Person and Conservator of the Estate, are petitioners.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need receipt schedule. 2. Need property on hand schedule. 3. Estate includes real property. Conservatee resides in a care facility. Disbursement schedule includes disbursements for the real property. Court may inquire as to the status of the real property. 4. Need declaration re: attorney fees. 5. Need original billing statements for Horizon Health and Subacute Center [care facility where the conservatee resides] pursuant to Probate Code §2620. 6. Order does not comply with Local Rule 7.6.1. All orders settling accounts shall contain a statement as to the balance of the estate on hand, specifically noting the amount of cash in the balance.
Cont. from	Account period: 3/1/2010 – 2/29/2012	
<input type="checkbox"/> Aff.Sub.Wit.	Accounting - <b>\$112,487.11</b>	
<input checked="" type="checkbox"/> Verified	Beginning POH - <b>\$ 81,461.11</b>	
<input type="checkbox"/> Inventory	Ending POH - <b>\$ 81,918.85</b>	
<input type="checkbox"/> PTC	(\$1,168.85 is cash)	
<input type="checkbox"/> Not.Cred.	Co-Conservator - <b>not requested</b>	
<input checked="" type="checkbox"/> Notice of Hrg	Attorney - <b>\$800.00</b>	
<input checked="" type="checkbox"/> Aff.Mail W/	Attorney Costs - <b>\$395.00</b>	
<input type="checkbox"/> Aff.Pub.	(filing fee)	
<input type="checkbox"/> Sp.Ntc.	Bond - <b>\$16,000.00</b>	
<input type="checkbox"/> Pers.Serv.	<b>Petitioners state</b> the conservatee owns two life insurance policies. The first has a cash surrender value of \$4,840.30 and the other has a cash surrender value of \$2,661.51. The beneficiary on both policies is the conservatee's deceased husband.	
<input type="checkbox"/> Conf. Screen	Petitioners request the authority to change the beneficiary designation to name	
<input type="checkbox"/> Letters	Petitioners as the beneficiaries in order to have access to the death benefits to pay for the Conservatee's funeral expenses when the time comes.	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		

*Please see additional page*

**Reviewed by: KT**

**Reviewed on: 5/8/12**

**Updates:**

**Recommendation:**

**File 3 - Dauer**

**Petitioners state** commencing January 2011, Petitioners and their mother Mary Dauer, have each been depositing \$100 into an account held by them to pay for Conservatee's expenses not covered by Conservatee's income. The following expenses are paid from this account as they come due:

Kaiser Permanente (health insurance)	\$81.00
State Farm (homeowners insurance)	\$78.58
PG&E (for conservatee's residence)	\$12.00 (average)
Biola Community Service (water)	\$50.75
DiBuduo and Defendis (probate bond)	\$100.00/year

**Petitioners request** that they be reimbursed for the funds deposited and used for that purpose upon the sale of the Conservatee's residence. An accounting of those funds would be provided to the court.

**Petitioner prays for an Order:**

1. Approving, allowing and settling the Second Account;
2. Ratifying, confirming and approving all acts and transactions of the conservator relating to conservatorship;
3. Allow Petitioners to change the beneficiary designation on the insurance policies to Petitioners;
4. Order Petitioners and Mary Dauer to be reimbursed for payments made from their personal funds for the care of Conservatee upon the sale of the residence and upon the presentation of an accounting, and
5. Authorizing the payment of attorney fees and costs.

**Court Investigator Jennifer Daniel's Report filed 4/9/12.**

**Amended First and Final Account and Report of Administrator and Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and for Distribution [Prob. C. 9202, 10800, 10810, 10951, 11600, 11850(a)]**

<b>DOD: 3/30/10</b>		<p><b>PUBLIC ADMINISTRATOR</b>, Administrator, is petitioner.</p> <p>Account period: 8/18/10 – 3/26/12</p> <p>Accounting - <b>\$188,300.00</b>                  Beginning POH - <b>\$188,300.00</b>                  Ending POH - <b>\$132,879.51</b></p> <p>Administrator - <b>\$6,319.00</b>                  (statutory)</p> <p>Administrator X/O - <b>\$3,248.00</b> (per Local Rule for sale of real property, sale of personal property and preparation of taxes)</p> <p>Attorney - <b>\$6,319.00</b>                  (statutory, payable \$3,819.00 to County Counsel and \$2,500.00 to Susan Moore.)</p> <p>Bond fee - <b>\$588.44</b> (o.k.)</p> <p>Court fees - <b>\$204.00</b>                  (certified copies)</p> <p>Closing - <b>\$1,000.00</b></p> <p><b>Distribution, pursuant to intestate succession, is to:</b></p> <p>Robert Hartley - \$38,400.35                  David Guy - \$25,600.24                  Robert Guy - \$25,600.24                  Melody McCombs - \$25,600.24</p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input checked="" type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> W/		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input checked="" type="checkbox"/>	<b>Sp.Ntc.</b> W/		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b> 8/25/10		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		
		<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 5/8/12</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 4 – Hartley</b></p>	

**(1) First and Final Report of Administrator, (2) Petition for Final Distribution and (3) Allowance of Compensation for Statutory Commissions and for Statutory and Extraordinary Attorney's Fees**

<b>DOD: 9/9/2010</b>		<p><b>JEFFREY MARTIN</b>, Administrator, is petitioner.</p> <p>Accounting is waived.</p> <p>I &amp; A - <b>\$98,827.23</b></p> <p>Administrator (statutory) - <b>\$3,953.08</b></p> <p>Attorney (statutory) - <b>\$3,953.08</b></p> <p>Costs - <b>\$416.00</b></p> <p>Distribution, pursuant to intestate succession, is to:</p> <p>Robert James Santopietro, Jr. - 100%</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need property on hand schedule. California Rules of Court, Rule 7.651.</li> <li>2. Need statement re: Costs</li> <li>3. Need receipt for preliminary distribution.</li> <li>4. Petition does not contain a statement regarding Probate Code §216 and 9202(b) re: notice to the Director of Victims Compensation and Government Claims Board.</li> <li>5. Order does not comply with Local Rule 7.6.1. All orders in probate matters must be complete in themselves. Orders shall set forth all matters ruled on by the court, the relief granted, and the names of persons, descriptions of property and/or amounts of money affected with the same particularity as required of judgments in general civil matters. Monetary distributions must be stated in dollars, and not as percentages of the estate.</li> </ol>
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input checked="" type="checkbox"/>	<b>PTC</b>		
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> W/		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input checked="" type="checkbox"/>	<b>Sp.Ntc.</b> W/		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b> 1/19/11		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		
		<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 5/8/12</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 5 – Santopietro</b></p>	

**(3) (1) First and Final Account and Report of Personal Representative, Petition for Settlement, (2) Release of Funds on Deposit with the County of Fresno, for Allowance of Statutory Commission, Ordinary and Extraordinary Attorneys' Fees, Costs, and (4) for Final Distribution (Prob. C. 11623)**

DOD: 3/4/2006		MARK LUGO, Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS
		Account period: 3/4/06 – 2/23/02	<ol style="list-style-type: none"> <li>1. Need proof of service of the Notice of Hearing and a copy of the Petition on the Department of Health Services pursuant to their Request for Special Notice.</li> <li>2. Petition states that one of the heirs of the estate was confined to a prison or facility under the jurisdiction of the Pinal County Adult Detention in Florence, Arizona however the petition does not indicate whether or not notice to the Director of Victims Compensation and Government Claims Board was performed pursuant to Probate Code §216 and 9202(b).</li> <li>3. Petition does not contain a statement regarding if notice to the Franchise Tax Board was performed, as required by Probate Code 9202(c)(1).</li> <li>4. Need Order</li> </ol>
Cont. from		Accounting - <b>\$44,116.40</b>	
Aff.Sub.Wit.		Beginning POH - <b>\$40,144.89</b>	
✓ Verified		Ending POH - <b>\$44,116.40</b>	
✓ Inventory		Administrator - <b>\$1,764.66</b> (statutory)	
✓ PTC		Attorney - <b>\$1,764.66</b> (statutory)	
✓ Not.Cred.		Attorney X/O - <b>\$1,160.00</b> (per itemization, 6.4 hours @ \$200/hr)	
✓ Notice of Hrg		<p><b>Petitioner states</b> after the death of Richard Lugo, Integrated Lender Services foreclosed on the decedent's real property for non-payment of the mortgage to the lend. The property was then sold at a Trustee's Sale. On 12/12/07, Integrated Lender Service deposited with the Fresno County Clerk the net proceeds from the sale in the amount of \$40,144.89. The funds remain on deposit with the County of Fresno. The Administrator petitions the Court for release of those funds to pay creditors, costs of administration and distribution to heirs.</p> <p><b>Distribution, pursuant to intestate succession, is to:</b></p> <p>Department of Health Service (in satisfaction of their creditor's claim)</p> <p>- \$29,192.92</p> <p>Richard Lugo, III - \$2,684.72</p> <p>Mark Lugo - \$2,684.72</p> <p>Lorraine Serna - \$ 894.61</p> <p>Sandra Serna - \$ 894.61</p> <p>Tony Serna - \$ 894.61</p>	
✓ Aff.Mail W /			
Aff.Pub.			
Sp.Ntc. X			
Pers.Serv.			
Conf. Screen			
✓ Letters 2/9/11			
Duties			
Objections			
Video Receipt			
CI Report			
✓ 9202			
Order X			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice X			
			<b>Reviewed by: KT</b> <b>Reviewed on: 5/8/12</b> <b>Updates:</b> <b>Recommendation:</b> <b>File 6 - Lugo</b>

(1) First and Final Account and Report of Administration and (2) Petition for Allowance of Ordinary and Extraordinary Commissions and Fee and for (3) Distribution [Prob. C. 10800, 10810, 10951, 11600, 11850(a)]

<b>DOD: 12/07/08</b>	<b>PUBLIC ADMINISTRATOR</b> , Administrator, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>1. Need Receipts from Sharon Tuttle and Edgar Tuttle for the preliminary distribution of \$5,000.00.</b>
	Account period: 02/16/11 – 03/08/12	
	Accounting - <b>\$135,000.00</b>	
	Beginning POH - <b>\$135,000.00</b>	
	Ending POH - <b>\$31,240.35</b>	
<b>Cont. from</b>	Administrator - <b>\$4,780.00</b> (statutory)	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Administrator x/o - <b>\$1,248.00</b> (ok per Local Rule)	
<input checked="" type="checkbox"/> <b>Verified</b>	Attorney - <b>\$4,780.00</b> (statutory)	
<input checked="" type="checkbox"/> <b>Inventory</b>	Bond Fee - <b>\$337.50</b> (ok)	
<input checked="" type="checkbox"/> <b>PTC</b>	Costs - <b>\$866.50</b> (for filing fees, and certification of Letters)	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	Closing - <b>\$1,000.00</b>	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Petitioner states that preliminary distributions have been made as follows:	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> w/	Sharon Tuttle - \$5,000.00	
<input type="checkbox"/> <b>Aff.Pub.</b>	Edgar Tuttle - \$5,000.00	
<input type="checkbox"/> <b>Sp.Ntc.</b>	A preliminary distribution in the amount of \$5,000.00 was to be made to Denise Tuttle, however, it was learned that she filed bankruptcy, therefore	
<input type="checkbox"/> <b>Pers.Serv.</b>	Petitioner has retained her check.	
<input type="checkbox"/> <b>Conf. Screen</b>	<b>Distribution, pursuant to intestate succession, is to:</b>	
<input type="checkbox"/> <b>Letters</b> 02/16/11	Sharon Tuttle - <b>\$6,076.12</b>	
<input type="checkbox"/> <b>Duties/Supp</b>	Edgar Tuttle - <b>\$6,076.12</b>	
<input type="checkbox"/> <b>Objections</b>	Denise Tuttle - <b>\$6,076.12*</b>	
<input type="checkbox"/> <b>Video Receipt</b>	* Petitioner states that per Denise Tuttle's bankruptcy trustee, James Salven, she may not receive distribution from the estate and her distribution should be paid to him. Petitioner also intends to distribute the \$5,000.00 preliminary distribution to Mr. Salven.	
<input type="checkbox"/> <b>CI Report</b>		
<input checked="" type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 05/08/12
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 7 - Tuttle</b>

**Petition for Removal of Trustee, Account, and for Appointment of Successor Trustee**

		<b>ANDREW CHAFFER</b> , trust beneficiary, is petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Continued from 4/9/12. Minute order states Doug Chaffer is ordered to send 2/11 and 3/11 bank statements to Mr. Streett. Mr. Chaffer is also ordered to send any life insurance information to Mr. Streett.</p> <p>1. Need proposed order.</p>
		Petitioner states he is the grandson and 1/6 beneficiary under the <b>HARLEY E. CHAFFER TRUST</b> executed May 9, 1991. Petitioner states he does not possess a copy of the Trust. And amendment to the Trust was executed on October 29, 1998.	
Cont. from 121211, 022712, 040912		Harley E. Chaffer died on March 4, 2011 thereby making the Trust irrevocable.	
	Aff.Sub.Wit.	Petitioner is informed and believes that the successor Trustee is <b>DOUGLAS EDWARD CHAFFER</b> .	
✓	Verified	<b>Petitioner alleges:</b>	
	Inventory	1. The Trustee has violated his duty to inform the beneficiaries and has refused to provide Petitioner with a copy of the Trust, despite written requests.	
	PTC	2. The Trustee has violated his duty to Petitioner as Trustee has failed to ever render an accounting despite written request to do so.	
	Not.Cred.	<b>Wherefore, Petitioner prays for an Order:</b>	
✓	Notice of Hrg	1. Compelling Douglas Edward Chaffer to produce a copy of the Harley E. Chaffer Trust of May 9, 1991 and all amendments to it;	
✓	Aff.Mail	2. Compelling Douglas Edward Chaffer to account fully for all Trust property;	
	Aff.Pub.	3. Removing Douglas Edward Chaffer as Trustee;	
	Sp.Ntc.	4. Appointing a new Trustee as prescribed by the Trust;	
	Pers.Serv.	5. For costs of suit; attorney fees and for such other and further relief as the court deems proper.	
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

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

		NEEDS/PROBLEMS/COMMENTS:  <p><b>Continued to 5/16/12</b> at the request of the attorney.</p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 5/7/12
		Updates:
		Recommendation:
		File 10 - Hays

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

		NEEDS/PROBLEMS/COMMENTS:  <u>Continued to 5/16/12</u> at the request of the attorney.
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 5/7/12
		Updates:
		Recommendation:
		File 11 - Hays

Atty Doan, Mark Son-Hoa (pro per Petitioner/Guardian)  
 Atty Vo-Doan, Tien Hong (pro per Petitioner/Guardian)

**Status Re: Transfer to LA County**

Age: 10 years DOB: 4/22/02	<p><b>MARK SON-HOA DOAN</b> and <b>TIEN HONG VO-DOAN</b>, maternal uncle and maternal aunt were appointed successor guardians on 7/27/11.</p> <p>On 4/9/12 the Court granted Guardians, Mark So-Hoa Doan and Tien Hong Vo-Doan petition to transfer the proceedings to Los Angeles County.</p> <p>The file was transferred to Los Angeles County on 5/2/12.</p> <p>This status hearing was set for the Receipt of Transfer.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. <b>Waiting for Receipt of Transfer from Los Angeles County.</b></p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
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Notice of Hrg		
Aff.Mail		
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Duties/Supp		
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Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	Reviewed by: KT	
	Reviewed on: 5/7/12	
	Updates:	
	Recommendation:	
	File 13 - Vo	

Status Hearing Re: Receipt of Blocked Account

Age: 7	<p><b>MAVIS JEAN and ALAN WILLIAM REINHARDT</b>, Maternal Grandmother and Step-Grandfather, were appointed Co-Guardians of the Person and Estate of Jesse R. Trask on 2-9-12 with all funds ordered to be placed in a blocked account.</p> <p>The original petition stated Jesse’s mother, who passed away in January 2011, had a life insurance policy through her employer (County of Fresno) that was estimated at between \$10,000.00 and \$20,000.00, and Petitioners have been instructed by the insurance company to place the funds into a blocked account.</p> <p>The Court set this status hearing for receipt of funds in blocked account.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Continued from 3-26-12</u></p> <p><b>Note:</b> Examiner met with the Guardian after the last hearing to explain the process:</p> <p>Please note that the Letters issued 2-16-12 do not authorize the Guardians to take possession of money or property without specific court order; <u>however</u>, the Order to Deposit Money Into Blocked Account filed 2-9-12 is the specific court order that authorizes “all funds” to be deposited into a blocked account.</p> <p>The Letters, together with that Order, allows Guardians to obtain the funds to place into the blocked account. The Guardians were provided a blank copy of the Receipt Form (MC-356) for the bank to sign upon deposit. As of 5-9-12, the Receipt has not been filed.</p> <p>1. Need receipt of funds in blocked account.</p>
DOB: 1-16-05		
Cont. from 032612		
Aff.Sub.Wit.		
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Letters		
Duties/Supp		
Objections		
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CI Report		
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Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	Reviewed by: skc	
	Reviewed on: 5-9-12	
	Updates:	
	Recommendation:	
	File 15 - Trask	

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

Age: 1 DOB: 04/18/11	<p align="center"><b><u>NO TEMPORARY REQUESTED</u></b></p> <p><b>LINDA SAIZ</b>, maternal great aunt, is Petitioner.</p> <p>Father: <b>JHONNY SALAMON</b> – <i>Declaration of Due Diligence filed 03/13/12</i></p> <p>Mother: <b>VERONICA CABALLERO</b> – <i>Consent &amp; Waiver of Notice filed 03/13/12</i></p> <p>Paternal grandparents: UNKNOWN – <i>Declaration of Due Diligence filed 03/13/12</i></p> <p>Maternal grandfather: JORGE CABALLERO          Maternal grandmother: MONICA ORELLANA – <i>Consent &amp; Waiver of Notice filed 03/13/12</i></p> <p>Siblings: VICTOR MURRILLO (4), MARIAH MURRILLO (2)</p> <p>Petitioner states that Niko has lived with her since birth. The mother stated that she was unable to care for him and asked her if she would raise him.</p> <p><b>Court Investigator Jennifer Young's report was filed 05/04/12.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li><b>Need Notice of Hearing.</b></li> <li><b>Declaration of Due Diligence filed 03/13/12 states that the father's whereabouts are unknown and he has not been seen since the mother became pregnant. He told the mother that he was from Oaxaca, Mexico and was in the U.S. illegally. It is unknown if he is still in the area. If diligence is not found, need proof of personal 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 and Waiver of Notice for:</b> <ul style="list-style-type: none"> <li>- Jhonny Salamon (father)</li> </ul> </li> <li><b>Need proof of service by mail 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 and Waiver of Notice or Declaration of Due Diligence for:</b> <ul style="list-style-type: none"> <li>- Jorge Caballero (maternal grandfather)</li> <li>- Paternal grandparents – unless diligence is found, Declaration of Due Diligence filed 03/13/12 states that they are unknown.</li> </ul> </li> </ol>	
Cont. from			
Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			x
Aff.Mail			x
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			x
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<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
Objections			
Video Receipt			
<input checked="" type="checkbox"/> CI Report			
9202			
<input checked="" type="checkbox"/> Order			
Aff. Posting			
Status Rpt			
<input checked="" type="checkbox"/> UCCJEA			
Citation			
FTB Notice			
Reviewed by: JF			
Reviewed on: 05/09/12			
Updates:			
Recommendation:			
File 16 - Caballero			

**18 Kylee Rose Hernandez (GUARD/P)**  
**Atty Greer, Myrna (pro per – maternal grandmother/Petitioner)**  
**Atty Greer, Larry (pro per – maternal grandfather/Petitioner)**

**Case No. 12CEPR00393**

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

Age: 8 DOB: 09/26/03		<b><u>GENERAL HEARING 07/05/12</u></b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		MYRNA GREER and LARRY GREER, maternal grandparents, are Petitioners.		<ol style="list-style-type: none"> <li>1. <i>Need Notice of Hearing.</i></li> <li>2. <i>Declarations of Due Diligence filed re mother and father states that the father is unknown and the mother's current whereabouts are unknown, and she has not been seen since May 2011. If diligence is not found, need proof of personal service at least 5 court days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Temporary Guardian of the Person or Consent and Waiver of Notice or:</i> <ul style="list-style-type: none"> <li>- Crystal Greer (mother)</li> <li>- father (unknown)</li> </ul> </li> </ol>	
		Father: <b>UNKNOWN</b> – Declaration of Due Diligence filed 05/08/12			
Cont. from		Mother: <b>CRYSTAL GREER</b> – Declaration of Due Diligence filed 05/01/12			
<input type="checkbox"/>	Aff.Sub.Wit.	Paternal grandparents: UNKNOWN			
<input checked="" type="checkbox"/>	Verified	Siblings: NATHANIEL DIAZ (14) – Consent & Waiver of Notice filed 05/08/12			
<input type="checkbox"/>	Inventory	ANISSA JIMENEZ (5)			
<input type="checkbox"/>	PTC	GABRIEL JIMENEZ (4)			
<input type="checkbox"/>	Not.Cred.	Petitioners state that Kylee has lived with them since December 2010. They have enrolled her in school and provided for all of her needs. Petitioners would like to get medical and dental insurance for the minor and need a guardianship to do so. Kylee's mother has not been seen or heard from since May 2011, she was last thought to be in jail in Las Vegas in February 2012.			
<input type="checkbox"/>	Notice of Hrg	x			
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<input type="checkbox"/>	Pers.Serv.	x			
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<input checked="" type="checkbox"/>	UCCJEA				
<input type="checkbox"/>	Citation				
<input type="checkbox"/>	FTB Notice				
				Reviewed by: JF	
				Reviewed on: 05/09/12	
				Updates:	
				Recommendation:	
				File 18 – Hernandez	