



## 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.

**Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution**

<b>DOD: 08/30/12</b>	<b>KATRINA BEST KENDALL</b> , daughter, was appointed as Administrator with bond in the amount of \$260,000.00 and full IAEA authority. Bond was filed 12/06/12 and Letters were issued on 12/06/12.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><u>CONTINUED FROM 04/25/14</u></b></p> <p>1. Need Accounting/Report of Administrator and Petition for Final Distribution.</p> <p><b>Note:</b> Yvette Best, daughter, filed a new Petition for Probate and Motion to be added as co-administrator that are set for hearing on 06/09/14.</p>
<b>Cont. from 013114, 030714, 042514</b>	Inventory & Appraisal, partial no. 1, filed 05/16/13 - \$61,251.00	
<b>Aff.Sub.Wit.</b>	Inventory & Appraisal, final, filed 06/10/13 - \$61,251.00	
<b>Verified</b>	Yvette Best, daughter, filed a competing petition to be appointed as Administrator. Her Petition was denied on 12/12/13 due to lack of vacancy at Administrator. She has also filed a declaration that appears to be an objection to Katrina Best Kendall's handling of the Estate.	
<b>Inventory</b>	Order to Reduce Bond was filed 01/23/14, reducing the bond to \$61,251.00.	
<b>PTC</b>	<b>Status Report filed 04/24/14</b> states: The Administrator engaged a CPA and the busy tax season has delayed the filing of the accounting. The CPA very recently provided the financial information for the First and Final Accounting to the attorneys for the Administrator, but the financial information was not in a condition ready to be filed with the Court and requires revision to be placed in the proper accounting format. Therefore the Administrator requests a 3 week continuance.	
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 05/12/14
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 1 – Best</b>

**First-Amended Petition for Instructions and to Determine Entitlement**

Edith DOD: 3-12-12	<b>CLARENCE DALE STEVENS</b> is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
Sam DOD: 9-27-97	<b>Petitioner states</b> he is the named successor trustee	
	and beneficiary of the Edith Lillian Mitchell Stevens	
	Revocable Living Trust dated 11-2-83, as amended 5-	
	4-04, 5-9-07, and 2-11-08. Attached to the petition are	
<b>Cont. from 121613, 022414, 042414</b>	the trust and the 2 <sup>nd</sup> and 3 <sup>rd</sup> amendments. Petitioner	
Aff.Sub.Wit.	states the 1 <sup>st</sup> amendment has been irretrievably lost	1. <b>As previously noted:</b> Notice to certain beneficiaries was sent "C/O" other persons. However, <u>direct</u> notice to the person entitled thereto is required by Cal. Rules of Court 7.51 ( <u>even to a minor or a conservatee</u> ), and notice to the attorney, if represented, is required by Probate Code §1214. The Court may require continuance for proper notice (30 days' direct notice) to all persons entitled to notice, as noted above.
✓ Verified	or stolen, but its non-existence is of no legal or factual	
Inventory	consequence, as the terms, conditions, and	Specifically, notice to Betty Lou Amalino was sent "C/O" Public Guardian, rather than directly, as previously noted.
PTC	instructions under which the trust is to be	
Not.Cred.	administered and distributed are more than	
✓ Notice of Hrg	adequately described in the 2 <sup>nd</sup> and 3 <sup>rd</sup>	
✓ Aff.Mail	amendments.	
Aff.Pub.	Petitioner states Sam C. Stevens and Edith Lillian	
Sp.Ntc.	Mitchell Stevens were once married and residing in	
Pers.Serv.	the County of Fresno. They had four children of the	
Conf. Screen	marriage: Robert Duane Stevens; Betty Lou Amelino;	
Letters	Larry Bryan Stevens; and Clarence Dale Stevens	
Duties/Supp	(Petitioner).	
Objections	Sam and Lillian wrote two revocable living trusts	
Video Receipt	during their marriage to address their estate planning	
CI Report	needs and desires. Sam's trust dated 11-2-83 is also	2. Need order.
9202	attached for reference. Petitioner notes the	Reviewed by: skc
Order	"reciprocal provisions" of Sam's and Edith's trusts.	Reviewed on: 5-12-14
Aff. Posting		Updates:
Status Rpt	Petitioner states that the two trusts told title to multiple	Recommendation:
UCCJEA	parcels of real property in both Fresno County and	File 2A – Stevens
Citation	within the State of California and a promissory note	
FTB Notice	secured by real property in Torrance, CA, said	
	property being vested in the name of Betty Lou	
	Amelino.	
	Petitioner states there is no ambiguity in the writings	
	created by Edith prior to her death, and that	
	Petitioner is the unquestioned successor trustee of her	
	trust under the 3 <sup>rd</sup> Amendment dated 2-11-08.	
	A dispute has arisen between the beneficiaries and	
	trustees of the two trusts.	
	<b>SEE ADDITIONAL PAGES</b>	

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**Petitioner states** that on 10-10-13, Robert Stevens filed an unlawful detainer action against petitioner 13CECL09482 seeking to evict Petitioner from real property located at 19760 E. American Avenue, Reedley, CA 93654 (APN 333-290-13). See deed at Exhibit H. (Deed dated 1983 indicates that Sam and Edith granted this property in one-half undivided interests to each of their respective trusts.) Petitioner submits that is beyond dispute that title to this real property is vested as such.

Petitioner believes the UD action initiated by Robert Stevens was brought against Petitioner with an intent to vex, annoy, harass, and needlessly impose financial punishment upon Petitioner, and the Court must issue instructions and make findings confirming Petitioner as the proper successor trustee of Edith's trust, as amended, or a multiplicity of separate but related legal actions will ultimately be filed between the interested parties to each of the trusts.

**Petitioner requests the following:**

1. **An adjudication, finding, and instruction from the Court that, under operation of the 3<sup>rd</sup> Amendment dated 2-11-08, Petitioner is confirmed as the due, proper, and only successor trustee of the Edith Lillian Mitchell Stevens Revocable Living Trust dated 11-2-83 as amended 5-4-04, 5-9-07, and 2-11-08;**
2. **An adjudication, finding, and instruction from the Court that the 3<sup>rd</sup> Amendment is in full force and effect;**
3. **An adjudication, finding, and instruction from the Court that the 3<sup>rd</sup> Amendment controls and instructions Petitioner as successor trustee how the trust estate contained within the trust shall be distributed; and**
4. **That the Court order such other and further relief as it may deem proper.**

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**Objections filed 2-18-14 by Robert Stevens state** that pursuant to the notice sent pursuant to § 16061.7, Petitioner had 120 days from the date of service of such notice to bring action. 120 days passed and no objections were received; therefore, Robert signed the Affidavit of Change of Trustee on each trust property reflecting that he was the new owner of the property. Petitioner has not performed any duties in what he claims to be his capacity as successor trustee of the Edith Trust, has not made any effort to comply with Probate Code § 16061.7. By his failure to respond to the 120 day notice to file action or even inform Robert of the existence of what he claims are valid amendments to the trust, he has waived his right to act as trustee and enforce those amendments.

Objector states at a minimum Petitioner is liable under § 16061.9 for the significant damages, attorney's fees and costs caused by his failure to serve the notification required by § 16061.7.

**SEE ADDITIONAL PAGES**

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**Objector states** that since Edith's death in 2012 and until recently, Dale has acted as if he is the sole owner of the several properties owned by the Sam Trust and the Edith Trust, and collected rents from tenants for over 18 months and has never accounted for his actions. While he admits that Robert is the trustee of the Sam Trust, he nevertheless collected rents and used those rents for his own advantage and has ignored Robert's request to account for rents collected.

After Robert was finally able to collect some of the rents upon providing copies of the deeds showing Robert as successor trustee, Dale even filed an unlawful detainer action against a tenant at one of the properties in this county claiming to be the owner of the property. The tenant property paid Robert, which Dale knew, but chose to ignore. He could not provide proof that he was the owner of the property and the case was dismissed.

Objector states Dale was acting as de facto trustee of the Sam Trust and the Edith Trust prior to Edith's passing and collecting all rents. Edith was not competent and could not have exercised the duties of trustee. The rents were clearly not used to pay for upkeep and repairs. Not only is Dale liable for the waste he has caused, his failure to keep the properties safe subjects both the Sam Trust and the Edith Trust to liability.

**Objector requests the Court order Dale to file an accounting from the time he began acting as de facto trustee, including all information as to the cash Edith had up until her death, and requests that the Court order Dale to stay off the properties owned by the trusts and quit collecting rent thereon.**

**Objector requests the Court:**

- 1. Deny the First Amended Petition for Instructions and to Determine Entitlement;**
- 2. Order that Robert Stevens be allowed to continue as trustee of the Edith Trust;**
- 3. Order Clarence Dale Stevens to provide an accounting of the Edith Trust;**
- 4. Order that Clarence Dale Stevens stay off the properties owned by the Edith Trust and cease collecting rent on those properties;**
- 5. Award damages, cost and attorney fees as will be proven at trial; and**
- 6. For other and further relief as the court deems proper.**

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**Declaration of Petitioner's Attorney Michael G. Karby Re: Defects of Service on First Amended Petition, Request for Continuance, and Imposition of Sanctions on Attorney filed 2-20-14 states:** On 2-20-14, the attorney learned for the first time that beneficiary Betty Lou Amalino has two conservators: The Fresno County Public Guardian acts as Conservator of her Estate, but on Cathy Y. Dunn Chappel acts as Conservator of her Person. He had previously sought an address and was informed to serve the Public Guardian and counsel of record, Gary Motsenbocker; however, it is now discovered that he was misinformed. He is now informed that Ms. Amalino and Ms. Chappel reside in Canon City, Colorado. Having never known these facts until this morning, it is now known that Ms. Amalino was not properly served. Mr. Karby presents his most sincere apology before the Court and all parties and attorneys interested in this matter and requests that his client not be surcharged or sanctioned in any manner, that all sanctions be imposed upon the attorney personally because although he exercised his best efforts, they were obviously not vigorous enough. Mr. Karby will appear on 2-24-14 and make further apologies and pay sanctions imposed.

**Status Hearing**

<b>Edith DOD: 3-12-12</b>	<p><b>CLARENCE DALE STEVENS</b> filed his Petition for Instructions and to Determine Entitlement on 10-24-13 and his Amended Petition on 1-14-14.</p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>																																													
<b>Sam DOD: 9-27-97</b>																																															
	<p>On 2-18-14, <b>ROBERT STEVENS</b> filed objections.</p>																																														
	<p>At Settlement Conference on 4-24-14, the Court set this status hearing, status conference statements due one week prior to the hearing.</p>																																														
<table border="1"> <tr><td><b>Aff.Sub.Wit.</b></td><td></td></tr> <tr><td><b>Verified</b></td><td></td></tr> <tr><td><b>Inventory</b></td><td></td></tr> <tr><td><b>PTC</b></td><td></td></tr> <tr><td><b>Not.Cred.</b></td><td></td></tr> <tr><td><b>Notice of Hrg</b></td><td></td></tr> <tr><td><b>Aff.Mail</b></td><td></td></tr> <tr><td><b>Aff.Pub.</b></td><td></td></tr> <tr><td><b>Sp.Ntc.</b></td><td></td></tr> <tr><td><b>Pers.Serv.</b></td><td></td></tr> <tr><td><b>Conf. Screen</b></td><td></td></tr> <tr><td><b>Letters</b></td><td></td></tr> <tr><td><b>Duties/Supp</b></td><td></td></tr> <tr><td><b>Objections</b></td><td></td></tr> <tr><td><b>Video Receipt</b></td><td></td></tr> <tr><td><b>CI Report</b></td><td></td></tr> <tr><td><b>9202</b></td><td></td></tr> <tr><td><b>Order</b></td><td></td></tr> <tr><td><b>Aff. Posting</b></td><td></td></tr> <tr><td><b>Status Rpt</b></td><td></td></tr> <tr><td><b>UCCJEA</b></td><td></td></tr> <tr><td><b>Citation</b></td><td></td></tr> <tr><td><b>FTB Notice</b></td><td></td></tr> </table>		<b>Aff.Sub.Wit.</b>		<b>Verified</b>		<b>Inventory</b>		<b>PTC</b>		<b>Not.Cred.</b>		<b>Notice of Hrg</b>		<b>Aff.Mail</b>		<b>Aff.Pub.</b>		<b>Sp.Ntc.</b>		<b>Pers.Serv.</b>		<b>Conf. Screen</b>		<b>Letters</b>		<b>Duties/Supp</b>		<b>Objections</b>		<b>Video Receipt</b>		<b>CI Report</b>		<b>9202</b>		<b>Order</b>		<b>Aff. Posting</b>		<b>Status Rpt</b>		<b>UCCJEA</b>		<b>Citation</b>		<b>FTB Notice</b>	
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	<p><b>Petitioner's Status Conference Statement filed 5-9-14 states</b> that at the settlement conference, mention was made that the decedent might have written a Last Will and Testament sometime in 2010 that might have affected her trust and its amendments. The original will was not in possession of any party or attorney and there was even some doubt as to its existence, but it was certainly a foundation element that had to be addressed before the Court could move on to the seminal question presented in the petition: Who is the proper trustee of the Edith's trust?</p>																																														
		<p>Following the settlement conference, Petitioner noted that a photocopy of the alleged 2010 will was attached to the Respondent's settlement conference statement as part of Exhibit G, which everyone overlooked, and Exhibit H is a writing purporting to revoke the 2010 will and reinstate the trust and all its amendments.</p>																																													
	<p>Exhibit G of Respondent's settlement conference statement filed 4-16-14 produces photocopies of 3 separate wills that were apparently created and executed by Edith during her life: One dated 11-2-83 when she created her trust with her husband; one dated 2-11-08, when she executed her third trust amendment, and one dated 6-20-10. Exhibit H produces a copy of a writing stylized as "REVOKE AND REINSTATEMENT" that is signed and notarized by Edith on 1-6-11. See attached.</p>																																														
		<p><b><u>SEE ADDITIONAL PAGES</u></b></p>																																													

**Page 2**

Petitioner states even if an original will is produced, it appears to have been revoked. Therefore, it appears evidentiary hearing will be necessary for the Court to make appropriate judicial findings re the following:

- Is the trust dated 11-2-83 in full force and effect?
- Is the trust dated 11-2-83 as amended 5-4-04, 5-9-07 and 2-11-08 in full force and effect as amended?
- If the trust in its amended form fails, what amendments fail and why?
- Does the 2010 will (if the original is ever produced) revoke the trust and its amendments?
- If so, does the writing stylized as a REVOKE AND REINSTATEMENT reinstate the trust as amended?

Petitioner states the notary that notarized the REVOKE AND REINSTATEMENT is still employed at the Pack and Ship in Reedley. Copies of her journal have been requested but not received. Petitioner concludes that the REVOKE AND REINSTATEMENT reinstated the trust as amended. The beneficiaries were polarized in their settlement discussions even before each retained counsel, so a contested evidentiary hearing should be calendared at least 60 days out from this status hearing. Court should order that California Rules of Court apply, specifically Rule 3.1548 – pretrial submissions.

Age:		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><b><u>OFF CALENDAR</u></b></p> <p>Kevin Gunner was appointed Administrator with Will Annexed on 2-11-14 and Letters issued 2-24-14.</p>
DOD:		
Cont. from		
Aff.Sub.Wit.		
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Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
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Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 5-12-14
		Updates:
		Recommendation:
		File 3 - Schofield

<b>DOD: 10-28-04</b>	<b>LEON Y. GEORGE</b> , father, and <b>ARMEN L. GEORGE</b> , brother, were appointed as Co-Administrators with Full IAEA without bond and Letters issued on 1-25-05.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<u>Cont'd from 2-14-14, 3-14-14</u>
<b>Cont. from 021414, 031414</b>	Leon Y. George is a resident of Fresno, CA. Armen L. George is a resident of Sammamish, WA.	<b>Minute Order 2-14-14: Counsel informs the Court that he is waiting on a copy of the brokerage account.</b>
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	The original petition alleged \$200,000.00 in personal property, annual income from personal property of \$5,000.00, and real property valued at \$150,000.00. However, no Inventory and Appraisal was ever filed pursuant to Probate Code §8800.	<b>Minute Order 3-14-14: Partial Inventory and Appraisal submitted to Mr. Diebert. Waiting on brokerage account.</b>
<input type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>		
<input type="checkbox"/> <b>Aff.Mail</b>		
<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>	Three Creditor's Claims have been filed totaling \$28,426.95, and a Request for Special Notice was filed by the State of California Franchise Tax Board on 11-6-06.	<b>As of 5-12-14, nothing further has been filed. The following issues remain:</b>
<input type="checkbox"/> <b>Letters</b>	No accounting or petition for final distribution was ever filed pursuant to Probate Code §12200.	<ol style="list-style-type: none"> <li><b>1. Need Inventory and Appraisal pursuant to Probate Code §8800.</b></li> <li><b>2. Need accounting and petition for final distribution pursuant to Probate Code §12200.</b></li> </ol>
<input type="checkbox"/> <b>Duties/Supp</b>	The Court set this status hearing for failure to file Inventory and Appraisal and failure to file accounting or petition for final distribution. Both attorney and personal representative(s) are ordered to appear.	
<input type="checkbox"/> <b>Objections</b>	Notice of Status Hearing was mailed to Attorney Jeffrey D. Simonian and to Administrators Leon Y. George and Armen L. George on 11-21-13.	<b>Note: Decedent's heirs pursuant to intestate succession would be his parents, Leon Y. George and Louise K. George.</b>
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		<b>Reviewed by:</b> skc
<input type="checkbox"/> <b>Status Rpt</b>		<b>Reviewed on:</b> 5-12-14
<input type="checkbox"/> <b>UCCJEA</b>		<b>Updates:</b>
<input type="checkbox"/> <b>Citation</b>		<b>Recommendation:</b>
<input type="checkbox"/> <b>FTB Notice</b>		<b>File 4 – George</b>

**Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for Failure to File a First Account or Petition for Final Distribution**

<b>DOD: 4-15-05</b>	<p><b>ANGELITA GARCIA</b>, Daughter, was appointed as Executor with Full IAEA without bond and Letters issued on 2-22-06.</p> <p>The Executor's Second Amended Petition estimated the estate to contain real property valued at \$155,000; however, no Inventory and Appraisal was ever filed.</p> <p>Dept. of Health Care Services filed two creditor's claims on 12-30-05 totaling \$297,816.16 as well as Requests for Special Notice.</p> <p>Notice of Pendency of Action filed 10-16-08 indicate an action entitled "Sandra Shewry, Director of the Department of Health Care Services vs. Joel M. Murillo, as Personal Representative of the Estate of Elvira Rodriguez, Decedent; and Does 1 through 20, inclusive." The nature of the action is a Complaint to Enforce and Collect Money Due on a Medi-Cal Creditor's Claim for \$41,055.02 pursuant to W&amp;I Code §14009.5.</p> <p>Thereafter, nothing further was filed.</p> <p>The Court set this status hearing on 11-22-13 and sent notice of hearing to Attorney Joel Murillo on 11-22-13.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Continued from 2-28-14</p> <p>Minute Order 2-28-14: The Court is advised that the house is the only asset which still needs to be appraised.</p> <p>As of 5-12-14, nothing further has been filed in this case.</p> <p>Note: A Petition to Determine Succession has been filed in separate case 14CEPR00329 that is calendared to be heard on 5-14-14.</p> <p>Note: Please note that due to the requests for special notice filed in this matter by DHS, notice should be served on DHS for that petition and for any status reports filed in this case.</p> <p>1. Need I&amp;A and/or petition for final distribution or verified written status report pursuant to Probate Code §12200 and local rules.</p> <p>Note: Inventory and Appraisal filed 2-27-14 indicates a final estate value of \$0. The Court may require clarification regarding the discrepancy between the estimated estate value of \$155,000 (real property) and the I&amp;A.</p> <p><i>Examiner's Note: Per an email from Mr. Murillo, this is a <u>partial</u> I&amp;A, not the final, and the final is with the probate referee. The Court may wish to confirm that the asset being appraised as of date of death is the house that was estimated at \$155,000.</i></p> <p>Reviewed by: skc</p> <p>Reviewed on: 5-12-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 5 – Rodriguez</p>
<b>Cont. from 022814</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
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<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

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

<b>DOD: 1/10/2006</b>	<b>MARGARET PERKINS</b> was appointed Executor with full IAEA authority and without bond on 5/30/2006.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>OFF CALENDAR.</b> Report of Executor is on calendar 6/19/14.
	Letters issued on 5/30/2006.	
<b>Cont. from 030714</b>	<b>MARGARET PERKINS</b> died on 2/4/2008.	
<b>Aff.Sub.Wit.</b>	<b>RICHARD BELDEN</b> was appointed successor Executor with full IAEA and without bond on 9/9/2008.	
<b>Verified</b>	Letters issued 9/9/2008.	
<b>Inventory</b>	Inventory and appraisal filed on 8/3/09 shows the estate valued at \$9,154.19.	
<b>PTC</b>	Inventory and Appraisal, partial no. 1, filed on 3/6/14 shows a value of \$175,000.00.	
<b>Not.Cred.</b>	<b>Creditor's Claims filed:</b>	
<b>Notice of Hrg</b>	<ul style="list-style-type: none"> <li>• Dept. of Health Care Services - \$4,942.89</li> <li>• Dept. of Health Care Services - \$35,824.29</li> <li>• St. Agnes - \$918.30</li> </ul>	
<b>Aff.Mail</b>	Notice of Status Hearing was mailed to attorney Gary Bagdasarian on 12/20/13.	
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
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		<b>Reviewed on: 5/12/14</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 6 – Brindle</b>



Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

<b>DOD: 01/12/13</b>	<p><b>WANDA JUNE TIMMONS</b>, mother, was appointed Executor with full IAEA and without bond on 03/19/13. Letters Testamentary were issued on 03/21/13.</p> <p><b>Minute order from hearing on 03/19/13</b> set this matter for status re filing the First Account and/or Petition for Final Distribution on 05/16/14.</p> <p><b>Inventory &amp; Appraisal, partial no. 1</b>, filed 04/10/13 - \$577,500.00</p> <p><b>Inventory &amp; Appraisal, final</b>, filed 09/18/13 - \$37,692.57</p> <p><b>Inventory &amp; Appraisal, supplemental</b> filed 01/21/14 - \$1,500.00</p> <p><b>Status Report</b> filed 04/24/14 states: Andrew Bier is the soil beneficiary of the estate. Some of the assets of the estate have been sold, however real property on Armstrong has not yet been sold. There has been interest in the property, but an escrow has not yet been opened. Andrew Bier has requested Petitioner to continue working with the realtor on his behalf as opposed to transferring the property to him and closing probate.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need Accounting/Report on Waiver of Account and Petition for Final Distribution.</p>	
<b>Cont. from</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
			<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 05/12/14</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 10 - Bier</b></p>

**Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution**

<b>Age: 06/29/11</b>	<p><b>KIRK KAYAJANIAN</b>, grandson, was appointed as Executor with full IAEA and without bond on 03/26/13.</p> <p><b>Minute Order from hearing on 03/26/13</b> set this matter for a status hearing regarding filing of the First/Final Account and Petition for Distribution for 05/16/14.</p> <p><b>Inventory &amp; Appraisal, final</b> filed 02/21/13          - \$137,500.00</p> <p><b>Inventory &amp; Appraisal, Reappraisal for sale</b> filed 02/21/13 - \$145,000.00</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need Accounting/Report of Executor and Petition for Distribution.</p>		
<b>Cont. from</b>				
<b>Aff.Sub.Wit.</b>				
<b>Verified</b>				
<b>Inventory</b>				
<b>PTC</b>				
<b>Not.Cred.</b>				
<b>Notice of Hrg</b>				
<b>Aff.Mail</b>				
<b>Aff.Pub.</b>				
<b>Sp.Ntc.</b>				
<b>Pers.Serv.</b>				
<b>Conf. Screen</b>				
<b>Letters</b>				
<b>Duties/Supp</b>				
<b>Objections</b>				
<b>Video Receipt</b>				
<b>CI Report</b>				
<b>9202</b>				
<b>Order</b>				
<b>Aff. Posting</b>				
<b>Status Rpt</b>				
<b>UCCJEA</b>				
<b>Citation</b>				
<b>FTB Notice</b>				
			<b>Reviewed by:</b> JF	
			<b>Reviewed on:</b> 05/12/14	
			<b>Updates:</b>	
		<b>Recommendation:</b>		
		<b>File 11 - Kayajanian</b>		

<b>DOD: 01/04/13</b>		<p><b>FRANCES YBARRA</b>, sister, Petitioned to be appointed Administrator on 07/02/13. At the hearing on 07/29/13, the Court denied the Petition and appointed the <b>PUBLIC ADMINISTRATOR</b>.</p> <p><b>Minute order from hearing on 07/29/13</b> set a status hearing on 09/09/13. That was continued to 11/22/13.</p> <p><b>Inventory &amp; Appraisal filed 09/18/13 - \$120,000.00</b></p> <p><b>Report Regarding Status of Estate</b> filed 11/15/13 states: A notice of proposed action was filed on 10/04/13 regarding the sale of the real property belonging to the estate. Having received no objections to the sale, the property is now in escrow. Once the money from the liquidation of the assets is received, the Public Administrator can proceed with the remaining tasks dealing with the administration of the estate. Among the tasks involved is preparing and filing the final taxes for the estate. In order to allow time to complete the administration of the estate and to prepare the documents needed for the preparation and filing of the final account, it is respectfully requested that the next status hearing be set no sooner than 6 months from the date of this hearing.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p style="text-align: center;"><b><u>OFF CALENDAR</u></b>  <b>First &amp; Final Account and Petition for Distribution filed 04/25/14 and set for hearing on 06/11/14</b></p>
<b>Cont. from 112213</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
		<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 05/12/14</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 12 – Ybarra</b></p>	

Status Hearing Re: Filing of the Inventory and Appraisal

Age:		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><b><u>OFF CALENDAR</u></b></p> <p>I&amp;A was filed 5-9-14</p> <p>Petition for Final Distribution filed 5-9-14 is set for hearing on 6-16-14</p>
DOD:		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 5-12-14
		Updates:
		Recommendation:
		File 13 - Vernava

Status Hearing Re: (1) Filing of Bond; (2) Receipt for Funds into Blocked Account

		<p><b>SHELIA STEARNS</b> was appointed Conservator of the Person and Estate with bond of \$50,000.00 and \$425,000.00 to be placed into blocked accounts pursuant to Evidentiary/Settlement Conference Minute Order dated 2-25-14 and the Order was signed on 3-5-14.</p> <p>Letters have not issued.</p> <p>On 3-5-14, the Court set this status hearing and mailed Notice of Status Hearing to Attorney Feigel.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Continued from 4-18-14</u></p> <p>1. <b>Need bond of \$50,000.00 and receipts re blocked accounts (MC-356) or verified written status report pursuant to local rules.</b></p>
<b>Cont. from 041814</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
		<b>Reviewed by:</b> skc	
		<b>Reviewed on:</b> 5-12-14	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 14 – Cook</b>	

<b>Age:</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b><u>OFF CALENDAR</u></b>  Bond filed 3-14-14
<b>DOD:</b>		
<b>Cont. from</b>		
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	
<input type="checkbox"/>	<b>Verified</b>	
<input type="checkbox"/>	<b>Inventory</b>	
<input type="checkbox"/>	<b>PTC</b>	
<input type="checkbox"/>	<b>Not.Cred.</b>	
<input type="checkbox"/>	<b>Notice of Hrg</b>	
<input type="checkbox"/>	<b>Aff.Mail</b>	
<input type="checkbox"/>	<b>Aff.Pub.</b>	
<input type="checkbox"/>	<b>Sp.Ntc.</b>	
<input type="checkbox"/>	<b>Pers.Serv.</b>	
<input type="checkbox"/>	<b>Conf. Screen</b>	
<input type="checkbox"/>	<b>Letters</b>	
<input type="checkbox"/>	<b>Duties/Supp</b>	
<input type="checkbox"/>	<b>Objections</b>	
<input type="checkbox"/>	<b>Video Receipt</b>	
<input type="checkbox"/>	<b>CI Report</b>	
<input type="checkbox"/>	<b>9202</b>	
<input type="checkbox"/>	<b>Order</b>	
<input type="checkbox"/>	<b>Aff. Posting</b>	
<input type="checkbox"/>	<b>Status Rpt</b>	
<input type="checkbox"/>	<b>UCCJEA</b>	
<input type="checkbox"/>	<b>Citation</b>	
<input type="checkbox"/>	<b>FTB Notice</b>	
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 5-12-14
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 15 - Watson</b>

Status Hearing Re: Filing a Guardianship in Washington

<b>Rogelio, age 13</b>	<p><b>VANESSA GONZALEZ</b>, maternal cousin, was appointed Successor Guardian on 11-8-12.</p> <p>On 9-3-13, the Guardian filed a Petition to Fix Residence Outside the State of California due to an anticipated move to Wapato, Washington.</p> <p>On 10-17-13, the Court granted the petition and signed the Order Fixing Residence Outside the State of California.</p> <p>The Court set this status hearing for the filing of a guardianship or equivalent in Washington pursuant to Probate Code §2352.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><u>Minute Order 3-7-14: No appearances. The Court directs that a copy of the Examiner Notes be sent to Vanessa Gonzalez. Matter continued to 5-16-14. Vanessa Gonzalez is ordered to be personally present on 5-16-14 or file a status report before the next hearing.</u></b></p> <p><b><u>Note: Ms. Gonzalez filed a status report on 5-8-14 that states the minor is still in her care and she is no longer requesting to move out of California.</u></b></p>
<b>Cont. from 030714</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: skc</b>
		<b>Reviewed on: 5-12-14</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 17 – Caldera</b>

**Status Hearing for the Filing of the Inventory and Appraisal**

<b>Age: 17</b>	<p><b>PETER JEFFREY GARZA</b>, father, was appointed as Guardian of the Estate on 11/29/12.</p> <p><b>Notice of Status Hearing</b> filed 12/20/13 set this matter for status regarding filing of the Inventory &amp; Appraisal on 03/28/14.</p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<p><u><b>CONTINUED FROM 03/28/14</b></u>  <b>Minute Order from 03/28/14 states: No appearances. The Court notes that the Inventory &amp; Appraisal has not been completed and the receipt for blocked account has not been filed. In the event the money has not been received, Peter Garza, Sr. is to provide copies of all communications to and from the insurance company. Matter continued to 05/16/14. The Court orders that Peter Garza, Sr. be personally present on 05/16/14. The Court directs that a copy of the minute order be sent to both Peter Garza, Sr. and Peter Garza, Jr.</b></p> <p><b>Clerk's Certificate of Mailing</b> filed 04/01/14 indicates that copies of the minute order from 03/28/14 was mailed to Peter Garza Sr and Peter Garza Jr on 04/01/14.</p> <p><b>As of 05/12/14, nothing further has been filed.</b></p> <p style="padding-left: 40px;">1. <i>Need Inventory &amp; Appraisal.</i></p>
<b>Cont. from 032814</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>		
<input type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 05/12/14
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 18A – Garza</b>

**Status Hearing Re: Failure to File Receipt for Blocked Account**

<b>Age: 17</b>	<b>PETER JEFFERY GARZA, SR.</b> , father, was appointed Guardian of the Estate on 11/29/12. The Order specified that all funds received were to be placed into a blocked account. Order to Deposit Money into Blocked Account was filed 11/29/12.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b><u>CONTINUED FROM 03/14/14</u></b>
		<b>Minute order from 03/14/14</b> states: The Court is advised that the money is still with the insurance company. Mr. Garza is directed to file a status report before the next hearing indicating that the minor has turned eighteen and a claim has been made to the insurance company.
<b>Cont. from 012414</b>	<b>Notice of Status Hearing filed 12/20/13</b> set this matter for a status hearing on 01/24/13 regarding failure to file receipt for blocked account. <b>Clerk's Certificate of Mailing</b> states that the Notice of Status Hearing was mailed to Peter Jeffery Garza, Sr. on 12/20/13.	<b>As of 05/12/14, nothing further has been filed in this matter.</b>
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 05/12/14
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 18B – Garza</b>

Probate Status Hearing Re: Filing 1st Account and Final Distribution

Age:		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>OFF CALENDAR.</b> Petition for Final Distribution filed and set for hearing on 6/24/14.</p>
DOD:		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 5/12/14
		Updates:
		Recommendation:
		File 19 – Steingraber

Atty Gardner, Norma (sister)

Atty Sabbatini, Jim (brother)

Probate Status Hearing Re: Termination of Conservatorship due to death of Conservator

<b>Age:</b> 54	<b>MARY SABBATINI</b> , mother, was appointed as Conservator of the Person in 1982.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>	<p><b>Notice of Status Hearing</b> filed 04/03/14 set this matter for status regarding terminating the Conservatorship due to Death of Conservator. <b>Clerk's Certificate of Mailing</b> states that the Notice of Status Hearing was mailed to Norma Gardner, Jim Sabbatini and Denise Sabbatini on 04/03/14.</p> <p><b>Court Investigator Charlotte Bien filed a report on 04/15/14.</b></p>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>		
<input type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input checked="" type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 05/12/14
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 22 - Sabbatini</b>