



ATTENTION

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

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

Thank you for your patience.

Amended Report to Court and Petition for (1) Supplemental Order to 2007 Order of Final Distribution; (2) Approval of Accounting; and (3) Order for Reimbursement of Costs

DOD: 8/23/1997	FRANK J. VOLPA , Executor, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: An Order for Final Distribution was entered on 10/9/2007. On 8/30/13 Mr. Volpa filed a Petition for Instructions disclosing to the court that he had only distributed a portion of the assets to the beneficiaries (both charities). Mr. Volpa's petition asked the court to approve payments to his new attorney and a CPA, if necessary, and allow said payments to be paid from the estate. The Court denied the request stating the court was not in a position to allow fees to be paid for what should have already been done.</p> <p style="text-align: center;">Please see additional page</p> <p>Reviewed by: KT</p> <p>Reviewed on: 5/13/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1 – Hanson</p>
	Account period 8/23/07 – 12/31/13	
	Accounting - \$1,139,739.39	
Cont. from 042114	Beginning POH - \$1,050,266.17	
	Ending POH - \$ 315,836.38	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Costs - \$1,668.00 (filing fees, certified copies, tax consultant and tax preparation).	
Inventory		
PTC		
Not.Cred.	Petition states Order for Final Distribution allowed distribution of \$2,744.18 however, Mr. Volpa was paid \$3,973.08. An overpayment of \$1,228.90. Petition further states that Mr. Volpa is owed earnings totaling \$1,728.00 from the 3200 shares of Microsoft stock delivered to him on 9/19/08. Leaving a balance due Mr. Volpa of \$499.10.	
Notice of Hrg	NA	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters	Closing Reserve - \$5,000.00	
Duties/Supp	Proposed Distribution is to:	
Objections	University of Montana – 8,543.679 shares of Vanguard Fixed Income Securities and \$18,576.54;	
Video Receipt	Sigma Chi Foundation – 1,353.586 shares of Wells Fargo Premier Lar Co Fund, 264.709 shares Wells Fargo Advantage Enterprise Fund, 537.186 shares of T. Rowe Price European Stock Fund, 460,387 shares of Vanguard extended Market Index Fund, 183.140 Shares of Vanguard Index Trust, 8,543.679 shares of Vanguard Fixed Income Securities and \$31,485.44.	
CI Report		
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	Please see additional page	

Petition states the estate's attorney Ruth Ratzlaff hired Raymond Love to assist her and Petitioner in matters relating to the estate. Mr. Volpa states he began working with Mr. Love shortly after his appointment. Mr. Love communicated with the various financial institutions and charitable beneficiaries and Mr. Volpa never did. After the Order for Final Distribution Mr. Volpa states he became angry with Mr. Love on a number of occasions on how long the process was taking. Mr. Love would always assure Mr. Volpa that they were having problems but that things would be completed soon. He did not specify the exact problem but he indicated it had to do with penalties on the Vanguard IRA. Mr. Volpa states he would tell Mr. Love to pay the penalty and move on. He would say he was trying to get it done and that he was working on it. Mr. Volpa states he wanted to complete the administration but felt that Mr. Love was in charge. Finally, Mr. Volpa states he had enough. At the suggestion of an acquaintance, Mr. Volpa contacted Wild, Carter & Tipton for assistance. It was then he learned that Mr. Love died in 2013. At no time did Mr. Love or Ms. Ratzlaff ever indicate there was a problem with delaying distribution, or with liquidating the shares of stock that were supposed to have been delivered to the beneficiaries.

Supplement to First Amended Report to the Court filed on 5/9/14 states at the hearing on 4/21/14 Judge Robert Oliver requested that the Petitioner submit additional information to the court. Attached as Exhibit A is an Asset Schedule showing the market value of the assets as of 2007 and the market value as of 12/31/2013. As the Court will see the total value of the assets has increased from \$204,675.73 to \$370,094.51.

After the last hearing, Petitioner's attorney contacted Ms. Ratzlaff by e-mail, facsimile and mail. To date Ms. Ratzlaff has not responded to Mr. Volpa nor to any attorney at Wild, Carter and Tipton. Petitioner paid the \$3,000.00 to Ms. Ratzlaff by Wells Fargo check no. 4606. The check cleared the estate on 10/18/2007.

The Court has indicated that it is contemplating imposition of a surcharge for failing to timely deliver the assets pursuant to the 2007 order. Petitioner asserts that under the circumstances a surcharge would be inappropriate.

- (A) As the Court is aware, Ruth Ratzlaff (still attorney of record) hired Mr. Love to assist her and Petitioner in matters of the estate. At no point did Ms. Ratzlaff or Mr. Love state that anything was amiss or that that the court would have an issue with the delay in distribution. To the contrary, as far as Mr. Volpa knew from Mr. Love estates ran into the types of issues they had and delay was not inappropriate or unusual. Never once did Mr. Love indicate that there was any possible adverse consequences as a result of any delay.
- (B) Neither the University of Montana nor the Sigma Chi Foundation has voiced any displeasure with the time it has taken to distribute the assets.
- (C) The value of the assets has actually increased since the 2007 order.
- (D) Mr. Volpa states he has already been "surcharged" by personally incurring very significant attorney fees to Wild, Carter and Tipton to assist him in this matter.
- (E) Mr. Volpa states he came to court willingly. He asserts he is trying to do the right thing.
- (F) Estate of Kampen (2011) 201 Cal.App.4th 971 states that an order for distribution is not a money judgment. Consequently it does not bear interest. As noted in Kampen, Probate Code §9601 does allow for surcharge with there is a loss in value of the property or where the executor made a profit. It also allows the court to relieve the executor for any breach of duty if he acted "in good faith under the circumstances as know by the personal representative . . ." Mr. Volpa states he had no idea the delay could result in adverse consequences. He did not profit from the delay nor was the delay his doing. He believed Mr. Love was in communications with Ms. Ratzlaff regarding such matters.

Accordingly, Mr. Volpa requests the Court relieve him of any surcharge and grant his request for delivery of the remaining assets of the estate. Mr. Volpa states he did not have a nefarious purpose, he did not profit from the situation and he had been led to believe problems of this sort were not unusual.

NEEDS/PROBLEMS/COMMENTS (cont.):

1. Petition states (former) attorney Ruth Ratzlaff was paid her statutory fees and the \$3,000.00 closing reserve. The Order for Final Distribution entered on 10/9/2007 states that any unused portion of the closing reserve was to be distributed equally to the remainder beneficiaries. Disbursement schedule includes payment of taxes and other fees that appear should have been paid by the closing reserve. Court may require clarification and itemization of the closing reserve.
2. First Amended Petition for Final Distribution filed on 9/18/2007 stated that federal and California estate taxes had been filed and that no federal or California estate tax was due because of the charitable gifts. The Petition also stated that the personal and fiduciary tax returns had been filed and 1997 through 2006. In addition the Order on Final Distribution included a closing reserve of \$3,000.00. Order on the Petition for Instructions denied Petitioner's request for payment of additional fees. The instant petition request the estate pay costs totaling \$1,668.00 and allows for a closing reserve of \$5,000.00 to pay any unexpected taxes or expenses. It appears that the Mr. Volpa should be personally liable for the additional fees and costs due to the delay in distributing the assets as ordered on 9/18/2007.

5 Lessie Bradley (Estate)

Case No. 07CEPR00632

Atty Moore, Susan L. (for Doris A. Johnson – Administrator/Petitioner)

Report of Sale and Petition for

DOD: 01/01/85	DORIS A. JOHNSON , Administrator, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Order appointing Administrator set bond in the amount of \$75,000.00, but it does not appear that bond has been filed. Need bond. Need Order.
	Sale Price - \$19,000.00	
	Overbid - \$20,450.00	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.	Reappraisal - \$19,000.00	
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory	Property - 25 E. Dunn Fresno, CA	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Publication - The Business Journal	
<input checked="" type="checkbox"/> Notice of Hrg	Buyer - Martha A. Avila	
<input checked="" type="checkbox"/> Aff.Mail w/		
<input checked="" type="checkbox"/> Aff.Pub.	Broker - \$1,140 (6% - payable 3% to London Properties and 3% to Keller Williams Westland Realty)	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	Petitioner states that the current bond amount of \$75,000.00 is sufficient.	
<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 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: 05/13/14
		Updates:
		Recommendation:
		File 5 - Bradley

(1) First Account and Status Report of Administrator, and (2) to set Aside Exempt Personal Property

DOD: 9/18/2007	LAURA DOZIER , surviving spouse/Administrator, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>There have been 5 continuances in this matter. As of 5/12/14 the following issues remain:</p> <ol style="list-style-type: none"> 1. Petition does not allege any fact as to why the personal property should be set aside for the surviving spouse. 2. Disbursement schedule does not include the nature and purpose of each disbursement as required by Probate Code §1062(b). 3. Petition states the Petitioner used the proceeds from the sale of a bulldozer to reimburse herself various administrative expenses. Need itemization. 4. Need order <p>Note: If the petition is granted the court will set a status hearing for the filing of the petition for final distribution on Friday, September 26, 2014 at 9:00 a.m. in Dept. 303.</p> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
	Account period: 2/4/2008 – 9/30/2013	
	Accounting - \$650,755.95	
	Beginning POH - \$650,750.00	
	Ending POH - \$333,000.00	
Cont. from 121113, 020314, 022414, 032414, 042114		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Petitioner states certain assets that were decedent's separate property constitute exempt personal property eligible to be set aside to the surviving spouse pursuant to Probate Code §6510. Petitioner requests the court set aside the following personal property with an aggregate value of \$10,250.00	
<input checked="" type="checkbox"/> Inventory	<ul style="list-style-type: none"> • 1997 Chevrolet pickup truck • 2005 Honda ATV R1V32 • 2005 KTM Motorcycle • 1963 Willy Jeep 	
<input checked="" type="checkbox"/> PTC	Petitioner states as surviving spouse, she is entitled to have the assets set over to her. Petitioner has already taken possession of the assets and requests that her actions be ratified and confirmed.	
<input checked="" type="checkbox"/> Not.Cred.	Petitioner states the estate is not yet in a position to close. An action was filed on a rejected creditor's claim. The estate defaulted. The estate now is reviewing the situation to see whether it is possible to file a motion to set aside the default. Petitioner believes it will take an additional 4-6 months to close the estate.	
<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 checked="" type="checkbox"/> Letters	2/4/08	
<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		
Please see additional page		<p>Reviewed by: KT</p> <p>Reviewed on: 5/13/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 6 – Dozier</p>

Petitioner prays for an order:

1. That the First Account and Report of Petitioner be settled, allowed and approved as filed;
2. That all actions of Petitioner as Administrator, as set forth in the petition, account and report be ratified, confirmed and approved;
3. That the exempt personal property described in the petition be set aside to the surviving spouse;
4. That the administration of the estate continue.

Amended Waiver of Accounting and Petition for Final Distribution and for Allowance of Compensation

DOD: 11-17-07	BRENT WISE , Son, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: Continued from 2-19-14, 3-27-14, 4-14-14 As of 5-12-14, nothing further has been filed. The following issues remain: <ol style="list-style-type: none"> 1. Petitioner Brent Wise has not been appointed as Successor Administrator and therefore has no standing to bring this petition. Brent Wise will first need to be appointed as Successor Personal Representative. 2. The original petition for probate alleged \$13,033.80 in personal property assets. However, I&A filed 3-14-08 indicated "various household furnishings and personal effects" valued at \$500.00 by the Administrator Jack Wise, rather than by the Probate Referee as required by Probate Code §8900. The Court may require clarification regarding the discrepancy in the amounts, and may require amended appraisal in accordance with applicable law. 3. Petitioner requests distribution to himself as the heir of both this decedent and the former Administrator/spouse of the decedent, who is entitled to a 1/2 share of this estate. However, Pursuant to Probate Code §11802, distribution to a post-deceased heir must be made to the personal representative of his estate. Court records show that Petitioner was appointed as Executor of his father's estate on 10-2-13 in 13CEPR00643. <u>Therefore, need amended distribution.</u> <u>Note:</u> Petitioner filed a Petition for Final Distribution of the estate of Jack Wise that was continued to 4-29-14; however, without distribution from <u>this</u> estate, it does not appear that <u>that</u> estate is in a position to close. 4. Petitioner includes a fee computation of \$20.00 based on the Administrator's value assigned to personal property assets in the I&A. Petitioner does not appear to request payment, but does appear to reduce the proposed distribution by \$20. <u>Need clarification:</u> If the assets on hand consist solely of personal property items rather than cash, as stated, how is the distribution reduced by \$20? Who is \$20 to be paid to? Pursuant to Probate Code §12205, compensation may be reduced due to delay in closing the estate. 5. Need order.
	JACK WISE , Spouse, was appointed as Administrator with Full IAEA without bond on 3-25-08.	
Cont. from 021914, 032714, 041414	Petitioner states the former Administrator died 4-18-13.	
Aff.Sub.Wit.	I&A: \$500.00 (See #2) POH: \$500.00 (personal property items)	
<input checked="" type="checkbox"/> Verified	Petitioner states he is the son of the decedent and the sole heir of the Wise family upon the death of Administrator Jack Wise, and has waived accounting.	
<input checked="" type="checkbox"/> Inventory	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> PTC	Petitioner provides a fee computation, but does not appear to request payment of fees.	
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 checked="" 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	<input checked="" type="checkbox"/> Petitioner requests distribution to himself as the sole heir of the Wise family.	
Aff. Posting	Brent Wise: \$480.00 (Personal property items?)	
Status Rpt	<input type="checkbox"/>	
UCCJEA	<input type="checkbox"/>	
Citation	<input type="checkbox"/>	
N/A FTB Notice	<input type="checkbox"/>	
Reviewed by: skc		
Reviewed on: 5-12-14		
Updates:		
Recommendation:		
File 7 – Wise		

Atty Whelan, Brian D., of Whelan Law Group (for Ian Kinsey, as Conservator of the Estate)
 Atty Flanigan, Philip M., sole practitioner (for Ian Kinsey, as Conservator of the Person)

Status Hearing Re: Filing of Increased Bond; and Filing of the First Account

		<p>IAN KINSEY, brother, was appointed Conservator of the Estate on 1/29/2013 with bond set at \$15,000.00.</p> <p>IAN KINSEY, brother, was appointed Conservator of the Person on 9/17/2013 (<i>Letters of Conservatorship of the Person</i> issued on 9/25/2013.)</p> <p>Proof of Bond in the sum of \$15,000.00 was filed 2/6/2013, and Letters of Conservatorship of the Estate issued on 2/28/2013.</p> <p>Final Inventory and Appraisal filed 5/2/2013 shows an estate consisting of all cash in the sum of \$250,000.00.</p> <p>Pursuant to Probate Code § 2620(a), first account was due on 2/28/2014.</p> <p>Minute Order dated 1/29/2013 from the hearing on the petition for appointment of Conservator of the Estate set the matter for Status Hearing on 3/21/2014 for filing of the first account of the conservatorship.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 3-21-14, 4-21-14</p> <p>Minute Order 4-21-14: No appearances. Personal appearance by Mr. Whelan and Mr. Flanigan required if blocked account receipt not filed.</p> <p>Note: An amended petition in the Special Needs Trust matter 14CEPR00028 is set for 5-22-14</p> <p>1. <i>Proof of Bond of \$15,000.00 filed on 2/6/2013 is insufficient for this Conservatorship Estate, as required under Probate Code § § 2320 and CA Rule of Court 7.207. Probate Code § 2320.1 provides that when the Conservator has knowledge of facts from which the Conservator knows or should know that the bond posted is less than the amount required under section 2320, the Conservator and the Attorney shall make an ex parte application for an order increasing the bond to the amount required under section 2320.</i></p> <p>Accordingly, Probate Code § 2320 requires that the Conservator file proof of additional bond in the sum of \$260,000.00, in order to bring total bond to \$275,000.00, the bond amount sufficient pursuant to Probate Code § 2320 and CA Rule of Court 7.207.</p> <p>It is noted that the <i>Minute Order</i> dated 9/17/2013 from the <i>Status Hearing Re: Increase of Bond</i> that Mr. Flanigan informed the Court that Mr. [Ian] Kinsey will not be able to get a bond.</p> <p>However, the duty remains upon Attorney Philip Flanigan and/or Attorney Brian Whelan as well as the Conservator to either comply with Probate Code § 2320.1 for increase in bond, or to request an alternative protection such as placing Conservatee's funds into a blocked account.</p> <p>~Please see additional page~</p>
Cont. from 032114, 042114			
✓	Aff.Sub.Wit.		
	Verified		
✓	Inventory		
	Increased Bond	X	
	Accounting	X	
	Notice of Hrg	X	
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.	X	
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt	X	
	UCCJEA		
	Citation		
	FTB Notice		
		<p>Reviewed by: LEG/skc</p> <p>Reviewed on: 5-13-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 10 – Kinsey</p>	

NEEDS/PROBLEMS/COMMENTS, continued:

2. Pursuant to Probate Code § 2328, Conservator should be required to deposit the entirety of Conservatorship estate funds, or a portion of the funds taking into account the **\$15,000.00** posted bond, into a blocked account for the Conservatorship Estate, with no withdrawals except upon Court order. Probate Code § 2328 provides, in pertinent part, that if the Conservatorship Estate has property which has been deposited with a financial institution, the Court may order that the property shall not be withdrawn except on authorization of the Court, and may either (1) exclude the property deposited in determining the amount of required bond or reduce the amount of the bond to be required with respect to the property deposited to such an amount as the Court determines is reasonable; or (2) If a bond has already been furnished or fixed, reduce the amount of bond to such an amount as the Court determines is reasonable.
3. Attorney **PAUL PIMENTEL** formerly represented the Conservator Ian Kinsey for the petition for appointment of Conservator of the Estate. Mr. Pimentel no longer represents Ian Kinsey, per *Substitution of Attorney* filed 5/24/2013 by Attorney **BRIAN WHELAN**, showing that Mr. Whelan represents Ian Kinsey as Conservator of the Estate as of 5/22/2013.

Attorney **PHILIP FLANIGAN** represented Ian Kinsey for the petition for appointment of Conservator of the Person, and appears to remain as attorney for Ian Kinsey as Conservator of the Person, as well as in his petition for order establishing special needs trust (Page 10).

Need clarification of the current attorney representation of the Conservator as to the Person and the Estate, based upon the statement of Attorney Flanigan at the hearing on 9/17/2013 regarding Conservator's inability to obtain bond, which appears to show Attorney Flanigan as the attorney responsible for the Conservator of the Estate obtaining bond.

4. Need first account of the conservatorship estate, or a verified Status Report and proof of service of notice of this Status Hearing with a copy of the Status Report to all interested parties pursuant to Local Rule 7.5(B).
5. Need proof of service of notice of the Status Hearing with a copy of the verified Status Report to Attorney Paul Pimentel, pursuant to the *Request for Special Notice* filed 1/27/2014.

Note: It is unclear from the *Minute Order* of 9/17/2013 whether Attorney Flanigan was holding himself out as representing the Conservator Ian Kinsey for both his role as Conservator of the Person and the Estate, since the *Minute Order* shows Attorney Brian Whelan was also present at that hearing and made no statements regarding bond. If Attorney Whelan no longer represents Ian Kinsey as Conservator of the Estate, then Mr. Whelan should file a *Substitution of Attorney* demonstrating that to the Court.

(1) First Account and Report of Conservator and (2) Petition for Allowance of Fees for Attorney and (3) Petition for Reduction of Bond

		<p>BEVERLY ANN HALL, Sister and Conservator of the Person and Estate, is Petitioner.</p> <p>Account period: 4-4-13 through 1-31-14 Accounting: \$117,221.72 Beginning POH: \$0.00 Ending POH: \$66,121.73</p> <p>Conservator: Not requested. Note: Pursuant to Petition and Order dated 11-12-13, Petitioner has received \$6,396.08 for services and reimbursement.</p> <p>Attorney Teixeira: \$1,700.00 for services from 10-1-13 through 2-22-14 – see itemized declaration. Note: Pursuant to Petition and Order dated 11-12-13, Attorney Teixeira has received a total of \$14,792.76 in fees and costs for the period of 1-15-13 to 9-30-13.</p> <p>Attorney Helon: \$1,054.50 – Court appointed attorney for Conservatee. See itemized declaration.</p> <p>Current Bond: \$182,600.00</p> <p>Petitioner states the current bond is excessive because the accounting shows the current balance of the conservatorship is \$66,121.73. That amount will be reduced by the fees and costs requested to approx. \$63,000.00. Therefore, the bond should be reduced to \$69,476.00 based on annual gross income of \$160.00 (interest) and 10% recovery cost. The Conservatee will not suffer harm as a result of reduction of the bond because the only asset of the conservatorship estate is the Wells Fargo account. The conservatee's daily needs and care are provided by resources outside of the conservatorship estate and those resources will continue to be available for her needs and care.</p> <p>Petitioner requests an order:</p> <ol style="list-style-type: none"> 1. Approving, allowing and settling the account and report as filed; 2. Authorizing payment to Attorney Teixeira in the amount of \$1,700.00 for services to the conservatorship estate; 3. Authorizing payment to Attorney Helon of \$1,054.50 for services on behalf of the Conservatee; 4. Reducing the bond to \$69,476.00; and 5. Any and all further relief that the Court deems just and proper. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 4-14-14</p> <p><u>SEE ADDITIONAL PAGES</u></p>
Cont from 041414			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w/o	
	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: 5-12-14</p> <p>Updates:</p> <p>Recommendation: File 11- Dhooghe</p>

NEEDS/PROBLEMS/COMMENTS:

The following items were previously noted. Please see summary of Declaration filed 5-7-14 following the notes:

1. Petitioner states the conservatee's daily needs and care are provided by resources outside of the conservatorship estate. Need clarification. The original petition for conservatorship indicated that Petitioner was already a "payee" for the Conservatee, but did not request to continue to hold assets outside of the conservatorship. Cal. Rules of Court 7.1059, Standards of Conduct for Conservator of the Estate, provides that the Conservator shall hold title reflecting the conservatorship in accounts. Probate Code §2890 et seq., provides the procedure for taking control of assets and accounts. Probate Code §2620(c) requires account statements at accounting. Therefore, need clarification: What are the "resources outside of the conservatorship estate" and why are they not included? There does not appear to be any order authorizing assets to be held outside of the conservatorship estate.

~~For example: The Disbursements Schedule indicates a payment of \$3,007.70 to "Motorola Pension Plan." The attorney fee declaration indicates that he spent time handling a pension overpayment. Therefore, it appears that the Conservatee receives pension income that is not accounted for in this accounting. Further, if an overpayment of such outside funds required repayment, why was it taken from the conservatorship estate instead of the account that the payments were paid to?~~

In reviewing the file for clues as to the conservatee's income, it appears that a declaration filed 11-8-13 states that the conservatee's income consists of SSI payments handled by "a representative payee" and not subject to conservatorship. ~~However, this does not explain the Motorola pension overpayment.~~ Further, since conservatorship has been established, income and expenses from all sources should be included in the account, including Social Security. See Conservatorship handbook.

Therefore, need amended account including all assets and income as well as documentation such as account statements as required by Probate Code §2620(c).

2. Petitioner requests that the bond be reduced. However, pursuant to #2 above, this does not appear appropriate, given that no information has been provided to the Court regarding the conservatee's income.
3. Probate Code §1063(h) states if the conservator has knowledge of real property located in a foreign jurisdiction, an additional schedule shall be included in the account that identifies the real property with a fair market value and state what actions have been taken to preserve and protect the property.

This Conservatee owns residential real property in Arizona. The Disbursements Schedule indicates that expenses of \$24,581.14 were paid in connection with that property, including property tax, repairs, and payoff of the mortgage (\$21,931.54).

Therefore, need explanation. What is the status of the house – Vacant? Occupied? Is there rent being received? If not, why not? Does the Conservator intend to sell the property in the future? How was it in the conservatee's best interest to pay off the mortgage in its entirety?

4. Disbursements Schedule indicates a payment of \$941.10 to an Arizona attorney, which does not appear to have been authorized by this Court. Need clarification with reference to Probate Code §2640 et seq., Cal. Rules of Court.

SEE ADDITIONAL PAGES

Page 3

Declaration of Beverly Ann Hall filed 5-7-14 states that references to "other resources" refer only to funds received as representative payee. Other than those funds and funds held in the conservatorship estate, there are no other resources. Although perhaps not explicitly stated in the petition for conservatorship, the estimates contained in the petition, the reasons stated therein for requesting conservatorship of the estate, and the declaration of Mr. Teixeira concerning the amount of the original bond had only to do with assets that the Conservatee might be entitled to as a result of her husband's death, which was the payments he had been receiving from the Motorola pension plan. The Motorola Pension Plan did not know that he had died and thus payments continued after his death into an account which existed for the purpose of making mortgage payments on the property to which the Conservatee became entitled. It took a while to clear this matter up with the credit union and the pension plan. However, no pension payments were made to the Conservatee during this account period.

The Conservatee received two residential properties in Arizona upon her husband's death. One was sold and proceeds are held by the conservator of the estate. It was an oversight that the other was not identified on a schedule. Please see attached exhibit A. The family home has not been sold. It is properly insured. Family members in Arizona check on it regularly. It is available and used for family gatherings and use of the swimming pool in order to make it appear occupied.

The accounting presented disbursements of only \$1,733.00 for property repairs. Some of that was for work that had been done on the property that was sold and the contractor had agreed to wait until the property was sold so that funds would be available for that work and to complete some work on the remaining property. Ms. Hall states she has also used her own personal funds, time, and effort, without requesting compensation, for repair, improvement, and maintenance of the remaining AZ property.

It is a matter of simple mathematics that it was in the conservatee's best interest to pay off the mortgage of the remaining home. The interest earned on funds held in the conservatorship estate is far less than interest being paid out on the mortgage. The payoff is saving money.

For sale of the AZ property, it was required to employ an attorney for the transaction. It may have been possible to include that expense as a cost paid out of escrow, but it was nonetheless a necessary expenditure to conclude the sale. To seek approval for this aspect of the sale process would have included additional expense and delay.

12 Stephen & Debra Winter Revocable Trust

Case No. 13CEPR00564

Atty Pape, Jeffrey B.

Atty Lull, Christopher

Atty Shahbazian, Steven L.

First Amended Petition to Determine Validity of Purported Trust, for Order Determining Interest in Trust Property and for Revocation of Trust Amendment

Age:		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Notes not prepared for this matter</u></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: JF
		Reviewed on: 05/12/14
		Updates:
		Recommendation:
		File 12 - Winter

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

Age: 70	<u>NO TEMPORARY REQUESTED</u>		NEEDS/PROBLEMS/COMMENTS:
	<p>LISA MUNSEY, daughter, is Petitioner and requests appointment as Conservator of the Person with medical consent and dementia powers to administer dementia medications and for placement in a secured perimeter facility and for appointment of Conservator of the Estate with bond set at \$61,422.00.</p>		<p>Court Investigator advised rights on 02/27/14.</p> <p>Voting rights affected, need minute order.</p>
Cont. from	<p>Estimated Value of the Estate: Personal property -\$29,282.00 Annual income -\$26,700.00 Total -<u>\$55,982.00</u></p>		<p>1. The Amended Petition indicates that Wendy Temple is a relative of the proposed conservatee, but her relationship is not stated. If Ms. Temple is a relative within the second degree, need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Probate Conservator or Consent & Waiver of Notice or Declaration of Due Diligence</i> for Wendy Temple.</p>
<input type="checkbox"/> Aff.Sub.Wit.		<p>Declaration of Jennifer Lancaster, D.O. supports request for medical consent and dementia powers.</p>	<p>2. Petitioner requests bond in the amount of \$61,422.00; however, based on the information provided in the petition, it appears bond should be set at \$61,580.20. (Bond calculation worksheet in the file for reference).</p>
<input checked="" type="checkbox"/> Verified		Voting rights affected.	<p>3. The Citation filed 02/27/14 has the name Mary Sunderraj as the person cited and as the person to whom the Citation and copy of the Petition were served. The Citation should be addressed to and personally served to the proposed conservatee, Roslyn Munsey. Need corrected Citation and proof of personal service at least 15 days before the hearing of Citation with a copy of the Petition for Appointment of Probate Conservator for Roslyn Munsey.</p>
<input checked="" type="checkbox"/> Inventory		<p>Petitioner states that the proposed conservatee has severe dementia and is unable to speak her needs or say when she is hungry. She must be in a climate controlled area due to having an allergy to cold. She requires assistance with all activities of daily living and is unable to manage her financial resources or pay her bills on her own.</p>	<p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Monday, 10/20/14 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Monday, 07/20/15 at 9:00a.m. in Dept. 303 for the filing of the first account.
<input type="checkbox"/> PTC			<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>
<input type="checkbox"/> Not.Cred.			<p>Reviewed by: JF</p>
<input checked="" type="checkbox"/> Notice of Hrg			<p>Reviewed on: 05/13/14</p>
<input checked="" type="checkbox"/> Aff.Mail w/			<p>Updates:</p>
<input type="checkbox"/> Aff.Pub.			<p>Recommendation:</p>
<input type="checkbox"/> Sp.Ntc.			<p>File 13 - Munsey</p>
<input type="checkbox"/> Pers.Serv. X			
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<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			

<table border="1"> <tr><td colspan="2">Thomas J. Davis</td></tr> <tr><td colspan="2">DOD: 6-5-00</td></tr> <tr><td colspan="2">Wealthea Davis</td></tr> <tr><td colspan="2">DOD: 3-25-98</td></tr> <tr><td colspan="2"> </td></tr> <tr><td colspan="2"> </td></tr> <tr><td colspan="2"> </td></tr> <tr><td colspan="2"> </td></tr> <tr><td> </td><td>Aff.Sub.Wit.</td></tr> <tr><td>✓</td><td>Verified</td></tr> <tr><td> </td><td>Inventory</td></tr> <tr><td> </td><td>PTC</td></tr> <tr><td> </td><td>Not.Cred.</td></tr> <tr><td>✓</td><td>Notice of Hrg</td></tr> <tr><td>✓</td><td>Aff.Mail</td></tr> <tr><td> </td><td>Aff.Pub.</td></tr> <tr><td> </td><td>Sp.Ntc.</td></tr> <tr><td> </td><td>Pers.Serv.</td></tr> <tr><td> </td><td>Conf. Screen</td></tr> <tr><td> </td><td>Letters</td></tr> <tr><td> </td><td>Duties/Supp</td></tr> <tr><td> </td><td>Objections</td></tr> <tr><td> </td><td>Video Receipt</td></tr> <tr><td> </td><td>CI Report</td></tr> <tr><td> </td><td>9202</td></tr> <tr><td>✓</td><td>Order</td></tr> <tr><td> </td><td>Aff. Posting</td></tr> <tr><td> </td><td>Status Rpt</td></tr> <tr><td> </td><td>UCCJEA</td></tr> <tr><td> </td><td>Citation</td></tr> <tr><td> </td><td>FTB Notice</td></tr> </table>	Thomas J. Davis		DOD: 6-5-00		Wealthea Davis		DOD: 3-25-98											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>JOSHUA DAVIS, Beneficiary, is Petitioner.</p> <p>Petitioner states he is a beneficiary of the Davis 1989 Family Trust dated 11-17-89 (the Trust) (Exhibit A). On or about the same date, Thomas and Wealthea Davis also created the Davis Family 1989 Life Insurance Trust (the Insurance Trust) (Exhibit B). The Family Trust became irrevocable on the settlors' deaths. The Insurance Trust was already irrevocable during their lifetimes. Petitioner states BRUCE NEILSEN is the successor trustee of both trusts.</p> <p>Petitioner states that following the death of Thomas Davis on 6-5-00, Petitioner, by his agent and CPA Tom Bell, inquired of Trustee Neilsen on multiple occasions about the nature of the Trust assets and timetable for distribution. Petitioner was aware that the decedents had owned real property in California, various stocks and bonds, as well as other assets to which Petitioner and the other named in this petition were beneficiaries.</p> <p>Petitioner has requested that Trustee Neilsen provide him with an account of his administration of the Trust, but Trustee Neilsen has not done so. Additionally, Petitioner believes portions of the trust property that were to be held fbo Trust beneficiaries and Insurance Trust beneficiaries have been used to make loans to beneficiaries other than Petitioner, all to the detriment of Petitioner and other beneficiaries who may have lost their share of Trust and Insurance Trust assets as a result of the breach of his duties to the beneficiaries by Trustee Neilsen.</p> <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p> <hr/> <p>Reviewed by: skc</p> <p>Reviewed on: 5-13-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 14 - Davis</p>
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Page 2

Petitioner states moreover, Trustee Neilsen has failed to require the execution of notes requirement repayments by the borrowers of the Trust and Insurance Trust assets, and/or that Trustee Neilsen has failed to require the repayment of principal and interest on the Trust and Insurance Trust monies by the borrowers, all to the detriment of Petitioner and the other beneficiaries.

Petitioner states the Trust estate was to be divided into 12 separate trusts immediately on the death of both settlors. Petitioner made inquiries of Trustee Neilsen as to what is held in the trust created for Petitioner, but Trustee Neilsen has not provided the requested information or any meaningful response. Petitioner is informed and believes that Trustee Neilsen has, without consent or knowledge of several of the beneficiaries, used Trust and/or Insurance Trust assets to fund business transactions initiated by other beneficiaries, all to the detriment of Petitioner and other beneficiaries.

Petitioner has been unable to determine what has been done with what portion of the Insurance Trust assets and the Trust assets which were to have been segregated from the rest of the Trust property and Insurance Trust property for Petitioner's benefit.

Petitioner requests the Court order as follows:

1. Directing Trustee Bruce Neilsen to prepare and file a complete account and report of his administration of the Davis 1989 Family Trust and the Davis 1989 Life Insurance Trust for the period of June 6, 2000 through March 31, 2014, inclusive;
2. Directing Trustee Bruce Neilsen to set the Account and Report for hearing and give notice of same pursuant to §17203;
3. Awarding Petitioner reasonable attorneys' fees and costs incurred in this matter; and
4. Granting any and all other relief as the Court deems just and proper.

SEE ADDITIONAL PAGES

NEEDS/PROBLEMS/COMMENTS:

1. This petition requests accountings for two separate trusts. The two separate trusts have separate terms, separate assets, and separate purposes, and as such consideration by the Court requires separate petitions, separate notice, separate files, separate filing fees, and ultimately separate accountings.

The Court may designate this case number as the Family Trust file and direct Petitioner to initiate a separate proceeding regarding the Life Insurance Trust.

2. Also, per its terms, the Family Trust was to immediately divide into twelve (12) separate trusts, only one of which was for Petitioner's benefit. Need clarification and authority regarding the scope of the request for accounting(s).

Note: The language in the instruments differentiates between division into separate trusts and into separate shares, as contemplated by the Life Insurance Trust.

3. Notice appears to have been mailed to six people as couples, rather than as individuals entitled to direct notice. The Court may require amended direct service pursuant to Cal. Rules of Court 7.51.
4. Probate Code §17200(b)(7) provides that the Court can compel the trustee to provide information or account if the trustee has failed to provide the requested information within 60 days after the beneficiary's reasonable written request. Here, Petitioner states that he requested information after the settlors' deaths, which was approx. 14 years ago, but Petitioner does not state if any recent written request was made pursuant to §17200(b)(7), or what response was received, if any, pursuant to the written request. The Court may require clarification as to whether this petition may be prematurely filed pursuant to §17200(b)(7) and may require continuance for formal request and response. (Note: The requests should be separated for each trust pursuant to the above items.)

Age: 82	<u>NO TEMPORARY IN PLACE</u> <u>TEMPORARY DENIED ON 04/15/14</u>		<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Proof of Service regarding the Citation indicates that service was performed pursuant to CCP § 415.30, however, no Notice and Acknowledgment of Receipt has been filed indicating that the proposed conservatee received and acknowledged receipt of the Citation. Therefore, need proof of personal service of the Citation at least 15 days before the hearing or Notice and Acknowledgement of Receipt executed by the proposed conservatee. Petitioners request that bond be set at \$6,574.11; however, based on the information provided in the Petition, bond should be set at \$72,315.20 (see CRC § 7.207). (Bond calculation worksheet is in the file for reference). <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Monday, 10/20/14 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Monday, 07/20/15 at 9:00a.m. in Dept. 303 for the filing of the first account. <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.			
<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.	w/		
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<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			

MELINDA MURRAY and MELANIE WELCH, daughters, are Petitioners and request appointment as Conservator of the Person with medical consent powers and dementia powers to administer medications and for placement in a secured perimeter facility, and for appointment as Conservator of the Estate with bond set at \$6,574.11.

Estimated Value of the Estate:
 Personal property - \$ 3,000.00
 Annual income - \$62,741.09
Total - \$65,741.09

Voting rights affected.

Petitioners state: the proposed conservatee has been diagnosed with dementia and can no longer care for herself. Her doctor advised the Petitioners that their mother should no longer be living by herself.

Court Investigator Julie Negrete filed a report on 05/05/14.

Reviewed by: JF

Reviewed on: 05/13/14

Updates:

Recommendation:

File 15 - Ratliff

DOD: 12/18/2012	PAULA ROBINSON was appointed as Special Administrator with Limited IAEA authority and without bond on 6/17/2013.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 111813	Letters of Special Administration expire on 5/19/14.	Continued from 11/18/13. Minute order states Mr. Motsenbocker requests an extension of the letters of special administration. The Court grants the request and orders the letters expire on 5/19/14.
Aff.Sub.Wit.		
Verified		1. Need 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.
Inventory	Petitioner was appointed for the limited purpose of pursuing actions to recover assets of the decedent held by others.	
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		Reviewed by: KT
Order		Reviewed on: 5/13/14
Aff. Posting		Updates:
Status Rpt		Recommendation:
UCCJEA		File 18 – Crawford
Citation		
FTB Notice		

	KA'REN VARTAN KETENDJIAN is conservator.	NEEDS/PROBLEMS/COMMENTS: Continued from 3/3/14. Minute order indicates there were no appearances. Matter continued to 5/19/14. A copy of the minute order was mailed to Ka'ren Vartan Ketendjian on 3/6/14.
	Order settling the first account for the account period ending on 12/31/2011 was signed on 5/17/12.	
Cont. from 030314		1. Need second account <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.
Aff.Sub.Wit.	Property on hand at the end of the first account totaled \$341,592.10.	
Verified	Current bond is \$140,910.00	Reviewed by: KT
Inventory	Order settling the first account set this status hearing for the second account.	
PTC		Reviewed on: 5/13/14
Not.Cred.		Updates:
Notice of Hrg		Recommendation:
Aff.Mail		File 19 – Ketendjian
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		

Age: 5 years	<p>TEMPORARY EXPIRES 3/28/14, extended to 5/19/14.</p> <p>ADELITA GOMEZ, paternal grandmother, is petitioner.</p> <p>Father: JAIME ARELLANO – personally served on 2/11/14</p> <p>Mother: CARA STEARNS</p> <p>Paternal grandfather: Jaime Arrellano – Declaration of Due Diligence filed on 3/7/14.</p> <p>Maternal grandparents: Unknown – Declaration of Due Diligence filed on 3/17/14.</p> <p>Petition does not indicate why a guardianship is necessary.</p> <p>Court Investigator Jennifer Daniel's Report filed on 3/16/14 recommends that the guardianship be granted.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 4/2/14. Minute order states father's fiancé Desiree Zamora objects to the petition. Ms. Zamora advises the court that the father is in custody and he desires the child to be with her. Ms. Zamora is directed to provide her contact information to the Clerk's office forthwith.</p> <p>As of 5/13/14 the following issues remain:</p> <ol style="list-style-type: none"> 1. Petition does not state why a guardianship is necessary. 2. Need proof of personal service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. Cara Stearns (mother) 3. If court does not dispense with Notice, need proof of service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice on: <ol style="list-style-type: none"> a. Jaime Arrellano (paternal grandfather) b. Maternal grandparents.
Cont. from 040214		
<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 type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv. W/		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
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<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
<p>Reviewed by: KT</p> <p>Reviewed on: 5/12/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 21 – Stearnes</p>		