



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.

DOD: 10-27-11		<p>MICHAEL JOHN PEREZ, Executor with Full IAEA without bond, is Petitioner.</p> <p>Accounting is waived.</p> <p>I&A: \$2,172,341.00 POH: \$2,212,298.99 (\$288,723.22 is cash)</p> <p>Executor (Statutory): Waived</p> <p>Attorney (Statutory): \$34,723.41</p> <p>Costs: \$3,259.05 (filing fees, certified copy, publication, appraisal)</p> <p>Petitioner states the decedent's will devises the estate to a testamentary trust, which divides into a marital trust and a family trust based on the minimum dollar amount necessary to eliminate or reduce estate tax. However, this is not an estate large enough to pay an estate tax; therefore, the marital trust is not funded. The decedent's husband is now deceased (DOD 3-24-13 – see related case 13CEPR00333 at Page 3). Petitioner requests that since he is now deceased, that distribution to the decedent's two children occur free of trust pursuant to Article IV, Subparagraph 4d of the will. Although the will instructs that the residue be distributed in trust, the intent of the testator that her children receive the residue free of trust is the overriding principle. Authority provided.</p> <p>Distribution pursuant to decedent's will and the above request:</p> <p>Michael John Perez, as Executor of the Estate of Mike Perez: Decedent's community property interest in the various personal property (furniture, furnishings, and personal effects) valued at \$7,500.00.</p> <p>Michael John Perez: \$10,000.00 as equalization payment</p> <p>Michael John Perez and Marvin Jean Perez, equally, the residue of the estate</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
	Aff.Sub.Wit.			
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	Duties/Supp			
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	CI Report			
✓	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
✓	FTB Notice			

Reviewed by: skc
Reviewed on: 5-19-14
Updates:
Recommendation:
File 1 - Perez

3 Mike Perez (Estate)

Case No. 13CEPR00333

Atty Garcia, Robert V. (for Executor Michael John Perez)

**(1) Report of Executor, Petition for Final Distribution on Waiver of Accounting and
(2) For Allowance of Compensation for Statutory Services**

DOD: 3-24-13		<p>MICHAEL JOHN PEREZ, Executor with Full IAEA without bond, is Petitioner.</p> <p>Accounting is waived.</p> <p>I&A: \$1,800,700.17 POH: \$1,821,495.24</p> <p>Executor (Statutory): Waived</p> <p>Attorney (Statutory): \$31,007.00</p> <p>Costs: \$3,138.50 (lodging fee, filing fees, courtcall, publication, appraisal, deed searches)</p> <p>Petitioner states the decedent's will devises the estate to a testamentary trust, which divides into trust shares to be then distributed outright to the beneficiaries if over age 21. Petitioner requests that distribution to the decedent's two children occur free of trust pursuant to Article IV, Subparagraph 4d of the will. Although the will instructs that the residue be distributed in trust, the intent of the testator that her children receive the residue free of trust is the overriding principle. Authority provided.</p> <p>Distribution pursuant to decedent's will and the above request:</p> <p>Michael John Perez: \$10,000.00 as equalization payment</p> <p>Michael John Perez and Marvin Jean Perez, equally, the residue of the estate</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
	Aff.Sub.Wit.		
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	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: 5-19-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 3 - Perez</p>	

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

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

DOD: 10/19/2013	<p>GARY MORRIS, JR., son and Beneficiary, filed a <i>Petition for Appointment of Successor Trustee</i> on 12/19/2013.</p> <p><i>Order Approving Petition for Appointment of Successor Trustee of the Gary F. Morris, Sr., 2013 Trust</i> filed 4/1/2014 appoints WALTER ALBERT MORRIS as Successor Trustee of the Trust, and finds bond shall be filed by the Successor Trustee in an amount to be determined following filing of inventory and appraisal. Status Hearing Re filing proof of bond is set for 5/8/2014.</p> <p><i>Order Setting Bond Amount</i> was filed 4/25/2014, finding the bond amount for WALTER ALBERT MORRIS, Successor Trustee of the Trust, is set at \$286,000.00.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>OFF CALENDAR</p> <p>Proof of Bond filed 5/9/2014.</p> <p>1. Need proof of bond in the sum of \$286,000.00 to be filed with the Court.</p>	
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FTB Notice			
		Reviewed by: LEG	
		Reviewed on: 5/19/14	
		Updates:	
		Recommendation:	
		File 6A - Morris	

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

Ex Parte Petition for Order Confirming Real Property as a Trust Asset

DOD: 10/19/2013		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;">OFF CALENDAR</p> <p>Order Confirming Real Property as a Trust Asset was filed 5/12/2014.</p>
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Citation		
FTB Notice		
		Reviewed by: LEG
		Reviewed on: 5/19/14
		Updates:
		Recommendation:
		File 6B – Morris

	TERI LYN JACKSON was appointed Guardian of the Estate on 10-12-10 with funds to be placed into blocked accounts. Letters issued on 10-12-10.	NEEDS/PROBLEMS/COMMENTS: <u>Continued from 5-19-14</u> <u>Minute Order 5-19-14: No appearances. The Court will consider eliminating this accounting as well as any subsequent accountings so long as proof of the blocked account is provided. Matter continued to 5-22-14. The Court orders Teri Lyn Jackson to be present on 5-22-14.</u> A copy of the minute order was mailed to Ms. Jackson on 4-17-14. <u>(Examiner's Note: The Receipts for the four Blocked Accounts were filed on 12-27-10.)</u> <u>Note: The Guardian was previously represented by Attorney Erin Childs; however, the attorney was relieved as counsel pursuant to order field 6-20-12, and the Guardian is now self-represented.</u> 1. The Second Account Current is now due. Need Second Account.
Cont from 041714	The First Account was settled on 2-2-12 and the Court set this status hearing for the filing of the Second Account.	
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FTB Notice		
		Reviewed by: skc
		Reviewed on: 5-19-14
		Updates:
		Recommendation:
		File 13 – Pelley

Petition to Establish Fact, Date, and Place of Marriage

		<p>MARIO CHAVEZ and ARMINDA CHAVEZ, are Petitioners.</p> <p>Petitioners state that they were initially married on 01/02/87. That marriage was recorded with the Fresno County Clerk on 01/05/87. Subsequent to the marriage, Mario discovered that he was not divorced from his previous wife, Cecilia Misquez. Mario and Cecilia filed a Joint Petition for Summary Dissolution of Marriage and on 03/22/88, the Fresno Superior Court entered a Final Judgment of Dissolution of Marriage. Mario and Arminda renewed their wedding vows on 01/18/92. Petitioners were ignorant to the fact that the initial marriage on 01/02/87 was invalid until they discovered that their marriage was not valid in February 2014.</p> <p>Petitioners request the Court to acknowledge the facts, date and place of the marriage ceremony on 01/18/92 as the actual true record of the marriage of Arminda Chavez and Mario Chavez. The ceremony was officiated by Father Francis Tasy at St. Anthony of Padua Church in Reedley. The ceremony was witnessed by Marcos Perez and Sylvia Perez.</p>	<p>NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 05/08/14</u></p> <ol style="list-style-type: none"> 1. Petitioners do not state that they obtained a marriage license for the 01/18/92 ceremony. Family Code §§ 420 et seq., states that before solemnizing a marriage, the officiant shall require the presentation of the marriage license, and that upon solemnizing the marriage, the officiant shall return the endorsed marriage license to the county recorder within 10 days after the ceremony. 2. Need Order. <p>If a valid license was not obtained, need authority for Court order establishing fact of marriage.</p>
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		<p>Reviewed by: JF</p> <p>Reviewed on: 05/19/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 19A - Chavez</p>	