

Amended Petition for Approval of Second and Final Account and Report of Conservator of the Person and Estate; Request for Payment of Conservator's Attorney; Request of Authorization to Distribute Assets to Administrator of the Estate and Named Beneficiaries; and Discharge Conservator of the Estate. Probate Code 2620

DOD: 1/1/14	CRAIG MACGLASHAN , Conservator, is petitioner.	<p>1. Billing statement for the First and Final Account listed the paralegal rate at \$60.00 per hour. This amended petition lists the paralegal rate at \$100.00 for the same billing period. This amounts to a difference of \$1,052.00 in fees. Need clarification. –<i>Declaration of Attorney Howk filed on 5/1/15 states when Ms. Nguyen-Bui joined their office she was an assistant. Since that time she has become a paralegal in the office. Mr. Howk states it was his error that he had missed adjusting her rates in their billing system.</i></p> <p>2. Prior billing statement did not include a charge for the attorney in the amount of \$84.00 on 9/17/12 however it is listed in the billing statement attached to the amended account. Need clarification. – <i>Declaration of Mr. Howk filed on 5/1/15 states when the error was discovered corrections were made to the billing. Instead of billing for the paralegal time he wrote of her time and billed for his time, which was spent in addition to the paralegal time.</i></p> <p style="text-align: center;">Please see additional page</p> <p>Reviewed by: KT</p> <p>Reviewed on: 5/19/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1 - McGlashan</p>
	Account period: 6/1/11 – 1/1/14	
Cont. from 040715, 050515	Accounting - \$2,037,282.39	
Aff.Sub.Wit.	Beginning POH - \$1,661,989.40	
<input checked="" type="checkbox"/> Verified	Ending POH - \$1,589,045.76	
Inventory	Conservator - waives	
PTC	Attorney - \$13,352.00	
Not.Cred.	(65.30 hours of paralegal and attorney time at \$100 - \$280 per hour.)	
Notice of Hrg	Costs - \$435.00 (filing fee)	
Aff.Mail	N/A	
Aff.Pub.		
Sp.Ntc.	Petitioner states the conservatee died on 1/1/14. Petitioner has been appointed as executor of the estate of Jamie McGlashan.	
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp	Petitioner prays for an Order:	
Objections	1. Approving, allowing and settling the second and final account and report of conservator;	
Video Receipt	2. All acts and transactions of Conservator as set forth in the accounting are ratified, confirmed and approved;	
CI Report	3. Authorizing the payment of attorney fees and costs;	
9202	4. Transfer of the remaining property on hand to Craig MacGlashan as executor of the estate of Jamin McGlashan and to Craig MacGlashan as joint owner of the Farmers Insurance Group Federal Credit Union Account.	
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

NEEDS/PROBLEMS/COMMENTS (cont.):

3. Prior billing statement had the paralegal preparing the order (\$24.00 charged) on 12/31/14. The billing statement attached to the amended account shows the attorney preparing the order (\$112.00 charged). Need clarification. – *Declaration of Attorney Howk filed on 5/1/15 states this correction was made to reflect his time and not to bill for the paralegal time.*

Determination of Attorney's Fees and Costs

DOD: 2-16-09	<p>GREGORY L. TAYLOR was appointed Administrator with Will Annexed with Limited IAEA without bond on 1-23-14. Letters issued 2-3-14. This status hearing for the filing of the first account or petition for final distribution was set at the hearing on 1-23-14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cont from 050515	<p>The Administrator's First and Final Account was filed 6-5-14. Objections were filed by Diane Elizabeth Taylor on 6-26-14.</p>	<p><u>OFF CALENDAR</u></p>
Aff.Sub.Wit.	<p>Order Approving First and Final Report of Administrator filed 7-11-14 ordered that the estate be brought to a close except for the matters of the Objector's to be filed petition for attorneys' fees and costs required to have the 2006 codicil admitted to probate, surcharge of the Objector, and responsive pleadings thereto. The Minute Order of 7-11-14 also set the matter for Settlement Conference/Court Trial.</p>	<p>Notice of Motion for Order Striking the Memorandum of Costs in its Entirety or in the Alternative Taxing Costs filed 5/8/15 is set for hearing on 6/17/15.</p>
Verified	<p>Status Report filed 3-10-15 states: The Order of 7-11-14 approved the account, reserving \$15,000.00 of the corpus and \$10,000.00 of Ms. Taylor's share to be held in the blocked account. The order provided for statutory and extraordinary fees to the Administrator's attorney and distribution except for the reserved amounts. The Court directed Administrator's attorney to file a petition to surcharge the Objector's share. The Order for Withdrawal of Funds for pro rata distribution and attorneys' fees was filed 7-23-14.</p>	<p>Note: Memorandum of Costs totaling \$27,315.38 was filed 4/20/15.</p>
Inventory	<p>Administrator filed a Petition for Surcharge of Objector Diane Taylor's Testate Share of the Estate on 8-8-14 and the matter was confirmed for trial. Objector Diane Taylor filed a Petition to Approve Attorney's Fees and Costs on 8-15-14. Objection and replies were timely filed.</p>	<p>Reviewed by: skc</p>
PTC	<p>On 11-4-14, after reviewing Judge Oliver's Order of Final Distribution signed 7-11-14, the Court found that the ONLY issue remaining was for Objector to file a memorandum of her costs. Attorney McCloskey, on behalf of the estate, filed his request to surcharge such fees, along with a declaration. The Court could find nowhere in the order where further evidence was to be admitted beyond what was noted above. Respondent agreed that there was no need for further evidence, and counsel for Objector did not provide any legal basis for an evidentiary hearing. As such, the Court ordered that no further evidence need be taken on this limited issue; the matter is returned to the Probate Court for a ruling on the attorney fee and cost issue.</p>	<p>Reviewed on: 5/19/15</p>
Not.Cred.	<p>On 3-20-15, the Court admonished the parties to follow the previous orders of the Court and ordered Memorandum of Costs to be filed by 4/20/15.</p>	<p>Updates:</p>
Notice of Hrg		<p>Recommendation:</p>
Aff.Mail		<p>File 2 - Taylor</p>
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		

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Memorandum of costs totaling \$27,315.38 includes:

- \$2,280.00 in filing and motion fees
- \$307.71 for service of process
- \$75 witness fees
- \$23,011.50 attorney fees
- \$606.17 for Models, blowups, and photocopies of exhibits
- \$1,035.00 Court reporter fees

Examiner notes the following for Court review:

1. \$105.00 is noted for filing and motion fees with reference to a status report on 10/24/13; however, Court records do not reflect a payment of that amount on that date. Please note that runner fees are considered a cost of doing business and not reimbursable per Local Rule 7.17.B.
2. \$435.00 for filing this Memorandum of Costs is noted for filing and motion fees; however, this Memorandum of Costs was not charged a filing fee.

(Therefore, \$440.00 may be deducted from the \$2,280.00 in filing and motion fees.)

		BRUCE BICKEL , Temporary Trustee, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Diane Huerta's Motion to Disqualify Conservatees' Attorneys of Record is set for hearing on 06/10/15</p> <p>1. The costs advanced include charges that are considered by the Court to be part of the cost of doing business as follows: Lexis-Nexis research - \$39.77 Photocopies - \$236.75 Runner Services - \$100.50 Total: \$377.02</p> <p>Additionally, the fees include 4.10hrs for Office Staff @ \$25/hr. for a total of \$102.50. Clerical Services are also considered by the Court to be part of the cost of doing business. It is noted that the charges for Office Staff appear to be for runner services. (See Local Rule 7.17B)</p> <p>Note: Fees are itemized by date and include attorney and paralegal fees. (See Exhibit B of the Petition)</p>
		On 10/22/13, Bruce Bickel was appointed Temporary Trustee of the Loeffler Family Trust (the "Trust"), with the limited power to pay Dr. and Mrs. Loeffler's residential care facility from the assets of the Trust. The Order after Hearing specifically provided that any payments from Trust assets were contingent on Court order.	
Cont. from		Trustors Dr. and Mrs. Loeffler are currently represented by Michael L. Farley and Jennie Barkinskaya of the Farley Law Firm regarding conservatorship matters which are currently pending for both Dr. and Mrs. Loeffler.	
	Aff.Sub.Wit.	An invoice for legal services has been received by Petitioner from the Farley Law Firm for legal services and costs advanced for Dr. and Mrs. Loeffler for the period of 11/03/14 through 02/24/15 in the total amount of \$12,789.88 (\$12,389.00 fees and \$400.88 costs).	
✓	Verified	The Court previously entered Orders authorizing and directing Petitioner to pay Trustors' attorney's fees on 3 occasions.	
	Inventory	Petitioner requests approval of the attorney's fees and costs advanced by the Farley Law Firm and authorizing and directing Petitioner to pay \$12,789.88 from RBC Brokerage Acct. titled in the name of Fred and Kathleen Loeffler Trust to the Farley Law Firm.	
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w/	
	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: 05/19/15	
		Updates:	
		Recommendation:	
		File 3 - Loeffler	

Order to Show Cause RE: Failure to File the Inventory and Appraisal

DOD: 06/30/11	<p>RICARDO GARCIA, brother, was appointed as Administrator with Limited IAEA and without bond on 07/21/14.</p> <p>Letters of Administration were issued on 07/24/14.</p> <p>Minute order dated 1/13/15 set an Order to Show Cause to Ricardo Garcia as to why he should not be removed as Administrator of the Estate for failure to file the Inventory and Appraisal. Mr. Garcia is ordered to be personally present in court on 2/24/15.</p> <p>- Copy of the minute order was mailed to Ricardo Garcia on 1/13/15.</p> <p>At the hearing on 2/24/15 the Court found good cause to remove Ricardo Garcia as Administrator and appointed the Public Administrator. Mr. Garcia was ordered to turn over any and all papers, documents and information pertaining to the estate to the Public Administrator within a week. Furthermore, the Court orders that Mr. Garcia no make any more rent payments of any kind to his mother; payments will not go to the Public Administrator.</p> <p>Inventory and Appraisal filed by the Public Administrator on 4/3/15 showing real property valued at \$200,000.00</p>	NEEDS/PROBLEMS/COMMENTS:
Cont. from 022415		
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: 5/19/15
		Updates:
		Recommendation:
		File 4 - Blanco

First and Final Account and Report of Administrator and Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and for Distribution

DOD: 01/25/14	PUBLIC ADMINISTRATOR , Administrator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. The Petition proposes to distribute \$21,068.21 to Albert Hall, however, he filed an assignment on 07/16/14 assigning his interest to Gwen Hall. Need clarification. 2. The Petition does not address notice to the Victim's Compensation Board pursuant to Probate Code § 9202(b).
	Account period: 05/20/14 – 12/31/14	
Cont. from	Accounting: \$239,016.97	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH: \$226,125.08	
<input checked="" type="checkbox"/> Verified	Ending POH: \$191,926.76 (all cash)	
<input checked="" type="checkbox"/> Inventory	Administrator: \$7,780.34 (statutory)	
<input checked="" type="checkbox"/> PTC	Administrator x/o: \$2,864.95 (Per Local Rule for sale of real property; sale of personal property and preparation of tax returns)	
<input checked="" type="checkbox"/> Not.Cred.	Attorney: \$7,780.34 (statutory) (to be split \$3,780.34 to County Counsel, \$2,200.00 to Greg Roberts, and \$1,800.00 to Stan Teixeira)(Greg Roberts and Stan Teixeira represented the original petitioners in this matter)	
<input checked="" type="checkbox"/> Notice of Hrg	Attorney x/o: \$1,176.00 (to Greg Roberts, per itemization for work done regarding Objection)	
<input checked="" type="checkbox"/> Aff.Mail w/	\$357.50 (to Stan Teixeira, per itemization for work done regarding Objection)	
Aff.Pub.	Bond Fee: \$348.57 (ok)	
Sp.Ntc.	Costs: \$486.00 (filing fees and certified copies to Public Administrator)	
Pers.Serv.	\$1,696.36 (filing fees, publication, title search to Stan Teixeira)	
Conf. Screen	\$891.00 (filing fees, publication, court call to Bruce and Gary Hall)	
Letters 06/09/14		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202 x		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
<input checked="" type="checkbox"/> FTB Notice		

Continued on Page 2

Distribution, pursuant to intestate succession, is to:

Gwen Allen, sister	\$21,068.21
Bruce Hall, brother	\$21,068.21
Gary Hall, brother	\$21,068.21
Albert Hall, brother	\$21,068.21
Janice Lacey, sister	\$21,068.21
Phillip Hall, nephew	\$10,534.11
Samonia Hall, grandniece	\$5,267.06
Evelyn Hall, grandniece	\$5,267.06
Kathy Hall, sister assignment filed 08/27/15)	\$15,968.21 (\$21,068.21 less \$5,100.00 to "Approved Cash" per
Sherry Hall, sister assignment filed 08/27/15)	\$15,968.21 (\$21,068.21 less \$5,100.00 to "Approved Cash" per

Thomas J. Davis DOD: 6-5-00	JOSHUA DAVIS, Beneficiary, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:																																														
Wealthea Davis DOD: 3-25-98																																																
Cont from 051914, 061814, 071614, 082714, 101414, 121514, 022314, 033015	<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>Note: Account and Report filed on 3/26/15 is set for hearing on 5/26/15; however the accounting is not provided in the format required by Probate Code §1060. See Page B.</p> <p>Note: On 8-26-14, Joshua Davis, Corey Davis and Brittney Davis filed a separate Petition for Order Compelling Trustee to Account and Report in Case 14CEPR00790, titled "Davis Family 1989 Life Insurance Trust – See Page 10 of this calendar.</p> <p>Minute Order 2-23-14: Mr. Neilson represents that the 2014 accounting is not yet back from the accountant. The Court admonishes that this will be the last continuance in this matter. If the accounting in this matter and in the related matter of 14CEPR00790 are filed at least two court days prior, then no appearance is necessary on 3/30/15. However, if the accountings are not filed, then a Status Report verified by the client is required as to each matter. Cont to 033015 900 303.</p> <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p>																																														
<table border="1"> <tr><td>Aff.Sub.Wit.</td><td></td></tr> <tr><td>✓ Verified</td><td></td></tr> <tr><td>Inventory</td><td></td></tr> <tr><td>PTC</td><td></td></tr> <tr><td>Not.Cred.</td><td></td></tr> <tr><td>✓ Notice of Hrg</td><td></td></tr> <tr><td>✓ Aff.Mail</td><td>w</td></tr> <tr><td>Aff.Pub.</td><td></td></tr> <tr><td>Sp.Ntc.</td><td></td></tr> <tr><td>Pers.Serv.</td><td></td></tr> <tr><td>Conf. Screen</td><td></td></tr> <tr><td>Letters</td><td></td></tr> <tr><td>Duties/Supp</td><td></td></tr> <tr><td>Objections</td><td></td></tr> <tr><td>Video Receipt</td><td></td></tr> <tr><td>CI Report</td><td></td></tr> <tr><td>9202</td><td></td></tr> <tr><td>✓ Order</td><td></td></tr> <tr><td>Aff. Posting</td><td></td></tr> <tr><td>Status Rpt</td><td></td></tr> <tr><td>UCCJEA</td><td></td></tr> <tr><td>Citation</td><td></td></tr> <tr><td>FTB Notice</td><td></td></tr> </table>			Aff.Sub.Wit.		✓ Verified		Inventory		PTC		Not.Cred.		✓ Notice of Hrg		✓ Aff.Mail	w	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	
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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.~~

Update: On 8-26-14, Joshua Davis, Corey Davis and Brittney Davis filed a separate Petition for Order Compelling Trustee to Account and Report in Case 14CEPR00790, titled "Davis Family 1989 Life Insurance Trust – See Page 7 of this calendar.

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.)
5. Need revised order.

Atty Neilson, Bruce A. (Attorney Trustee – Petitioner)

Account and Report of Trustee and Petition for its Settlement

		<p>BRUCE NEILSON, Trustee of the DAVIS 1989 FAMILY TRUST, dated 11/17/89, submits the account and report of administration as set forth in Exhibit A.</p> <p>Account period: 1/1/04 – 12/31/13</p> <p>The Trustee declares that he has read the account and report as prepared by Moore, Grider CPAs and knows the contents thereof.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. This Account is not in the form required by Probate Code §1060 and therefore cannot be reviewed by Examiner.</p>
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed on: 5/19/15
			Updates:
			Recommendation:
			File 6B - Davis

7 Florence E. Dolby (CONS/PE) Case No. 14CEPR00457

Attorney: Gary Bagdasarian (for Petitioner/Conservator Deborah Titus)

Attorney: Ruth P. Lind (court appointed for Conservatee)

Report of Sale and Petition for Order Confirming Sale of Real Property

		DEBORAH TITUS, Conservator, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued to 6/25/15 at the request of the attorney.</u></p> <p>1. Need proof of service of the Notice of Hearing on Ruth P. Lind, attorney for the conservatee.</p> <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Wednesday, June 24, 2015 at 9:00 a.m. in Department 303, for the filing of the receipt for blocked account. <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>
		Sale price - \$75,000.00	
		Overbid - 79,250.00	
Cont. from			
	Aff.Sub.Wit.	Reappraisal - \$75,000.00 (100% interest)	
✓	Verified		
	Inventory	Property - 2340 E. Clay Fresno	
	PTC		
	Not.Cred.	Publication - Business Journal	
✓	Notice of Hrg	Buyers - Nicholas R> Vandermeer & Renee A. Vandermeer, husband and wife as joint tenants.	
✓	Aff.Mail	W/	
✓	Aff.Pub.		
	Sp.Ntc.	Broker - \$3,3375.00 (4.5% - payable to 3% to London Properties and 1.5% to Wainwright & Associates)	
	Pers.Serv.		
	Conf. Screen		
	Letters	Current bond is \$20,000.00	
	Duties/Supp	All proceeds to be placed into a blocked account.	
	Objections		
	Video Receipt		
	CI Report		
✓	9202		
	Order		
✓	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: KT
			Reviewed on: 5/20/15
			Updates:
			Recommendation:
			File 7 - Dolby

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

DOD: 2/27/14		<p>IRENE IRLAS and RUBEN IRLAS, are petitioner and request appointment as Administrators without bond.</p> <p>Limited IAEA – o.k.</p> <p>Decedent died intestate.</p> <p>Residence: Selma Publication: Selma Enterprise.</p> <p>Estimated value of the estate:</p> <table> <tr> <td>Personal property</td> <td>-</td> <td>\$ 15,000.00</td> </tr> <tr> <td>Real property</td> <td>-</td> <td>\$120,000.00</td> </tr> <tr> <td>Total</td> <td>-</td> <td>\$135,000.00</td> </tr> </table> <p>Probate Referee: Steven Diebert.</p>	Personal property	-	\$ 15,000.00	Real property	-	\$120,000.00	Total	-	\$135,000.00	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 4/28/15. As of 5/19/15 the following issues remain:</p> <ol style="list-style-type: none"> 1. Need Waiver of Bond from all heirs. (Waiver of Bond have been filed for 8 of the 12 heirs however they are not on the mandatory Judicial Council form.) Need waiver of bond from all heirs on the mandatory Judicial Council form or bond set at \$15,000.00 <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Wednesday, June 24, 2015 at 9:00 a.m. in Department 303, for the filing of the bond, if required. • Wednesday, October 28, 2015 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. • Wednesday, July 27, 2016 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. <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>
Personal property	-		\$ 15,000.00									
Real property	-		\$120,000.00									
Total	-		\$135,000.00									
Cont. from 042815												
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<input type="checkbox"/>	FTB Notice											
		<p>Reviewed by: KT</p> <p>Reviewed on: 5/19/15</p> <p>Updates: 5/22/15</p> <p>Recommendation:</p> <p>File 8 - Irlas</p>										

Petition for Order Compelling Trustee to Account and Report

		<p>JOSHUA DAVIS, COREY DAVIS and BRITTNEY DAVIS, beneficiaries, are petitioners.</p> <p>Petitioners state Settlor Wealthea Davis died on 3/25/98 and Thomas J. Davis died on 6/5/00 – more than 14 years ago.</p> <p>BRUCE NEILSON ("Trustee Neilson") is successor Trustee.</p> <p>Petitioners state following the death of settlor Thomas J. Davis, by their agent and their CPA, Tom Bell, inquired on multiple occasions of Trustee Neilson about the nature of the Trust assets and the timetable for distribution. Petitioners believe that the Insurance Trust at its inception was funded with approximately \$2,370,000.</p> <p>Petitioners have requested that Trustee Neilson provide them with an account of his administration of the Insurance Trust, but Trustee Neilson has not yet done so.</p> <p>Additionally, Petitioners believe that portions of the Insurance Trust property that was to be held by Trustee Neilson for the benefit of the Insurance Trust beneficiaries has been used to make loans or excessive distributions to beneficiaries other than Petitioners, all to the detriment of Petitioners and other beneficiaries whose share of Insurance Trust assets have been improperly loaned or otherwise transferred to beneficiaries who were not entitled to receive what was loaned or otherwise transferred to them as a result of the breach by Trustee Neilson of his duties to the beneficiaries.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Please see related case on page 6.</p> <p>1. Need Order</p>	
Cont. from 121514, 022315, 033015, 033015				
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<input type="checkbox"/>	FTB Notice			
		<p>Please see additional page.</p>	<p>Reviewed by: KT</p> <p>Reviewed on: 5/19/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 9A – Davis Life</p>	

Moreover, Petitioners believe that Trustee Neilson has failed to require the execution of notes requiring repayment by the borrowers of the Insurance Trust assets, and/or that Trustee Neilson has failed to require repayment of principal and interest on the Insurance Trust monies by the borrowers, all to the detriment of Petitioners and the other Beneficiaries to whom loans were not made.

Petitioners believe that Trustee Neilson has transferred property belonging to the beneficiaries of the Insurance Trust in a manner that diminishes Petitioners' rights as beneficiaries under the Insurance Trust. Petitioners submit Trustee Neilson has refused to share information with Petitioners concerning what has been done with the assets of the Insurance Trust, and that such refusal constitutes a violation of Probate Code § 16060 which states the trustee has a duty to keep the beneficiaries "reasonably informed of the trust and its administration."

Further, Petitioners believe that Trustee Neilson has made substantially greater distributions to some beneficiaries than to others, in a manner which is inconsistent with the terms of the Insurance Trust. Some beneficiaries have been distributed or loaned far more than their "share" of the trust assets. Petitioners have been distributed far less than their "shares" and the Insurance Trust does not appear to hold sufficient assets to provide Petitioners with the assets to which they are entitled.

Petitioners request this Court order Trustee Neilson to provide a complete account and report of his administration of the Insurance Trust for the period from June 6, 2000 through the present.

Petitioners allege that Trustee Neilson should be personally surcharged for any damages resulting from his mismanagement of the Insurance Trust and failure to provide the beneficiaries with information as provided by law.

Petitioners allege that Trustee Neilson's failure to segregate the Insurance Trust assets as provided for in the Insurance Trust constitutes a breach of his fiduciary duties as Trustee.

As a proximate result of Trustee Neilson's breach of trust, there has been an extreme depletion of the Insurance Trust assets which would be available for distribution to Petitioners if not for the wrongful distributions and loans made by Trustee Neilson. Petitioners believe that Trustee Neilson's breach of trust has resulted in damages to Petitioners and the Insurance Trust in an amount not less than \$533,000.

Wherefore, Petitioners request the Court order the following:

1. Directing Trustee Bruce Neilson to prepare and file a complete account and report of his administration of the Davis Family 1989 Life Insurance Trust for the period of 6/6/2000 through 8/15/2014, inclusive;
2. Directing Trustee Bruce Neilson to set the Account and Report for hearing and give notice of same pursuant to Probate Code § 17203;
3. Awarding Petitioners reasonable attorneys' fees and costs incurred in this matter;
4. Surcharging Trustee Bruce Neilson as appropriate according to proof.

Hearing Re: Objections to the Accounting

	<p>JOSHUA DAVIS, COREY DAVIS and BRITTNEY DAVIS, beneficiaries, petitioned the court compelling Trustee Bruce Neilson to account and report.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Please see related case on page 6.</p>
	<p>Minute order (Judge Hamlin) dated 12/15/14 states Mr. Neilson is ordered to provide the accounting for 2014 by 2/13/15 and set this status hearing re: Objections to the Accounting.</p>	
Cont. from 033015	<p>Minute order dated 2/23/15 states Mr. Neilson represents that the 2014 accounting is not yet back from the accountant. The Court admonishes that this will be the last continuance in this matter. If the accounting in this matter and the related matter of 14CEPR00298 [page 6 of this calendar] are filed at least two court days prior, then no appearance is necessary on 3/30/15. However if the accountings are not filed, then a status report verified by the client is required as to each matter. Examiner note: An accounting was filed on 3/26/15 prior to the 3/30/15 hearing (see page 9C). Examiner notes for 3/30/15 indicated that he accounting did not comply with Probate Code §1060 et seq.</p>	
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FTB Notice		
		Reviewed by: KT
		Reviewed on: 5/19/15
		Updates:
		Recommendation:
		File 9B - Davis

Petitioner: Bruce Neilson (pro per)

Account and Report of Trustee and Petition for Its Settlement

		BRUCE A. NEILSON, Trustee, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Please see related case on page 6.</p> <p>2. This Account does not comply with Probate Code §1060 et seq. and therefore has not been reviewed by Examiner.</p>
Cont. from			
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	Citation		
	FTB Notice		
			Reviewed by: KT
			Reviewed on: 5/19/15
			Updates:
			Recommendation:
			File 9C – Davis

		TEMPORARY EXPIRES 5/26/15	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Petitioners filed declarations of due diligence for both parents and the unknown paternal grandparents. If diligence is not found, need notice pursuant to Probate Code §1511 or further diligence.</p>
		<p>JOHN WESLEY PEEBLES and MICHELLE PEEBLES, maternal grandparents, are petitioners.</p>	
		<p>Please see petition for details.</p>	
		<p>Court Investigator Report filed on 1/12/15.</p>	
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<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			<p>Reviewed by: KT</p>
			<p>Reviewed on: 5/19/15</p>
			<p>Updates:</p>
			<p>Recommendation:</p>
			<p>File 10 – Peebles-Gessner</p>

Pro Per Petitioner Desirée Borders, maternal grandmother

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

		NO TEMPORARY REQUESTED	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Page 11B is the competing petition for appointment of guardian filed by Armando Herrera and Ramona Herrera.</p> <p>Continued from 3/23/2015. Minute Order states Ms. Borders represents that Isis has been seeing Shawna Wilson, Child Psychologist, since February. Armando Herrera and Ramona Herrera have filed a competing petition that is set for 5/26/2015 and are admonished to bring their own interpreter on that date.</p> <p>Note Re ICWA Notice: US Mail Return Receipts have been filed with the Court showing acknowledgment of receipt by the persons, agencies, and tribes required to be given notice of this proceeding.</p> <p>Note for background: Minute Order dated 1/5/2015 states matter is continued to allow time for ICWA noticing. The Court orders the matter referred to the Department of Social Services to assess the safety and welfare of the minor children.</p> <p>Reviewed by: LEG</p> <p>Reviewed on: 5/21/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11A - Herrera</p>
		<p>DESIRÉE BORDERS, maternal grandmother, is Petitioner.</p> <p style="text-align: center;">~Please see Petition for details~</p> <p>Court Investigator's Report was filed on 12/18/2014.</p> <p>Court Investigator's Report was filed on 5/19/2015.</p>	
Cont. from 032315			
	Aff.Sub.Wit.		
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✓	Order		
	Aff. Posting		
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✓	UCCJEA		
	Citation		
	FTB Notice		

Pro Per Petitioner Ramona Herrera, paternal grandmother
 Pro Per Petitioner Armando Herrera, paternal grandfather

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

		NO TEMPORARY REQUESTED	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need proof of service by mail of the <i>Notice of Hearing</i>, with a copy of the <i>Petition for Appointment of Guardian</i>, for: <ul style="list-style-type: none"> • Desirée Borders, maternal grandmother. 2. Need <i>Confidential Guardian Screening</i> form to be filed with the Court for Petitioner Armando Herrera. 3. CI Report filed 5/19/2015 states it was reported that the children may have Cherokee and Choctaw Indian ancestry, and that an ICWA packet was provided to Petitioners. Petitioners must complete the original <i>Notice of Child Custody Proceeding for Indian Child</i> (Form ICWA-030), which the Court will serve on necessary agencies. 4. Need UCCJEA (form GC-120).
		<p>ARMANDO HERRERA and RAMONA HERRERA, paternal grandparents, are Petitioners.</p> <p>~Please see <i>Petition for details</i>~</p> <p>Court Investigator's Report was filed on 5/19/2015.</p>	
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			<p>Reviewed by: LEG</p> <p>Reviewed on: 5/21/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11B - Herrera</p>

Atty Staunton, Cynthia Ann (Pro Per – Beneficiary – Petitioner)
 Atty Buettner, Michael M. (for Joseph J. Marzullo – Trustee – Respondent)

Petition to Compel Account

Marguerite N. Marzullo DOD: 4-11-98		CYNTHIA ANN STAUNTON, Beneficiary, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 012115, 030415, 042115			
<input type="checkbox"/>	Aff.Sub.Wit.	Petitioner states she is a beneficiary of the Marzullo Revocable Living Trust dated 5-19-97 created by Joseph J. Marzullo, Jr., and Marguerite N. Marzullo, as settlors and trustees, as amended by the first and second amendments, both dated 5-19-97. Attached may not be a complete copy, only what she was given.	Minute Order 4-21-15: The Court's order that a complete copy of the Trust be provided to Ms. Staunton stands. Joseph Marzullo is ordered to be personally present in Court on 5-26-15. (Note: Declaration of Michael M. Buettner states a copy of the trust was mailed to Ms. Staunton on 4-23-15. The missing pages were the Table of Contents, attached.)
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory	Petitioner states she has made countless attempts to request a full and complete accounting, but the Trustee never provided Petitioner with any information regarding the trust estate. Petitioner is entitled to an account pursuant to §16062(a). Petitioner and her son are beneficiaries to whom as stated previous cannot at this time state under these codes what they are entitled to, however as the court to help us in this process. The trustee became the trustee as a result of the death of the surviving settlor [sic] Marguerite N. Marzullo on 4-11-98. Soon, she will have gone through 17 years of this and with his knowledge of Petitioner's finances and having no means to seek even the smallest amount of legal representation, advice, etc., and all these years with nothing.	The following issues remain noted: 1. Need proof of service of Notice of Hearing at least 30 days prior to the hearing pursuant to Probate Code §17203 on the trustee and all beneficiaries: - Darrell Jordan (named alternate successor trustee) - Any other person entitled to notice pursuant to §17203. Note: Petitioner listed only the trustee and beneficiaries in the petition; however, the trust provides the name of the alternate successor trustee, who is entitled to notice. The Court may require a complete list compiled and verified by Petitioner of all entitled to notice of these proceedings.
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.	Petitioner prays for an order:	2. The trust at Article VII, Section 7.6, states: During the time that either Settlor serves as Trustee hereunder no account shall be required of said Settlor serving as Trustee, such accounting being specifically waived in such instance by the Settlers. The Court may require clarification or authority regarding Petitioner's request for an accounting. (Do the amendments referenced provide further direction?)
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/o	1. Finding that notice of hearing has been given as required by law; 2. Compelling the trustee to deliver an account of the transactions of the trust to Petitioner by as soon as Court orders; and 3. For such other and further orders as the Court deems just and proper.	3. This petition was filed with a fee waiver. If Petitioner receives distribution, filing fees may be due.
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.	See Page 2.	Reviewed by: skc
<input type="checkbox"/>	Pers.Serv.		Reviewed on: 5-19-15
<input type="checkbox"/>	Conf. Screen		Updates:
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Page 2

Response filed 1-16-15 by Joseph J. Marzullo, Trustee, states he is not required to account for the period when the trust may be revoked. One of the subtrusts is the survivor's trust, and accordingly, no accounting need be made to Petitioner with respect of the survivor's Trust. Mr. Marzullo states he is the current beneficiary and sole trustee; therefore, no account is required. Also, Petitioner has failed to comply with notice provisions of §17203. He and Petitioner have had an estranged relationship for many years. Petitioner has been verbally abusive to Respondent and has made threats against him. In spite of this, Respondent has provided considerable financial assistance to Petitioner over the years.

Respondent prays that:

1. The Court deny the relief requested in the petition;
2. That Petitioner take nothing by way of her petition;
3. Such other and additional relief as the court deems appropriate.

Declaration of Michael M. Buettner filed 4-27-15 states the only pages Ms. Staunton was missing were Pages 1-3, which are the Table of Contents, attached.

Petitioner's Declaration filed 5-12-15 details her health and personal issues and states that she is missing the last three pages, 47, 48, and 49, the properties and the bank accounts. The declaration also provides details of various properties.

Examiner's Note: Petitioner mentions possible amendments; however, neither recent declaration mentions whether these amendments exist.

DOD: 11/23/14	JEREMY MCNABB , friend, was appointed Executor with full IAEA and bond set at \$302,000.00 on 01/26/15.	NEEDS/PROBLEMS/COMMENTS: 1. Need Inventory & Appraisal.
	Bond filed 02/13/15.	
Cont. from	Letters were issued on 02/18/15.	
Aff.Sub.Wit.		
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Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 05/19/15
		Updates:
		Recommendation:
		File 13 - Ugaste

Status RE: Filing of the Inventory and Appraisal

DOD: 6/2/14	<p>DYLEN CAMPBELL was appointed as Executor without bond and with full IAEA authority on 1/27/15.</p> <p>Letters issued on 2/2/15.</p> <p>Minute order dated 1/27/15 set this status hearing for the filing of the inventory and appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>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.</p> <p>Note: A Petition for Termination of Proceedings has been filed and is set for hearing on 6/24/15.</p>
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		Reviewed by: KT
		Reviewed on: 5/19/15
		Updates:
		Recommendation:
		File 14 - Campbell

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

		<u>TEMPORARY EXPIRES 05/26/15</u>	NEEDS/PROBLEMS/COMMENTS:
		STAVROS KISKIRAS , step-father, is Petitioner.	<u>CONTINUED FROM 03/09/15</u>
		Father: ANTHONY JYNES, SR. – <i>personally served on 02/13/15 and 04/14/15</i>	1. Declaration of Due Diligence filed 05/15/15 states that the current whereabouts of Joseph Jynes (paternal grandfather) is unknown. If diligence is not found, need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice for Joseph Jynes.
		Mother: TANYA STEWART – <i>Personally served on 02/05/15 and 04/16/15</i>	2. Anthony Jynes (minor) turned 12 between this hearing and the last, therefore, need proof of personal service at least 15 days before the hearing of Notice of Hearing with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice for Anthony Jynes (minor).
		Paternal grandfather: JOSEPH JYNES – <i>Declaration of Due Diligence filed 05/15/15</i>	
		Paternal grandmother: GLORIA MCAFEE (JYNES) – <i>personally served on 04/14/15</i>	
		Maternal grandfather: LARRY STEWART – <i>served by mail on 04/11/15</i>	
		Maternal grandmother: CARMEN BESKAKLIO – <i>personally served on 04/11/15</i>	
		Sibling: ELENI KISKIRAS	
		Petitioner states [see Petition for details].	
		Court Investigator JoAnn Morris filed a report on 03/04/15.	
Cont. from 030915, 042115			
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<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
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<input type="checkbox"/>	FTB Notice		
			Reviewed by: JF
			Reviewed on: 05/19/15
			Updates:
			Recommendation:
			File 16 - Jynes

Attorney: Rosemarie Rusca for Mark Daniel Sinawski and Anne M. Sinawski

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

		TEMPORARY EXPIRES 5/26/15	NEEDS/PROBLEMS/COMMENTS:
		MARK DANIEL SINAWSKI and ANNE M. SINAWSKI , maternal grandparents, are petitioners.	<ol style="list-style-type: none"> 1. Proof of service on the mother, Brandy Sinawski is incomplete. It does not include the name and address of the person serving the documents. It also does not state whether or not a copy of the petition was served with the Notice of Hearing as required. 2. Petition does not include the names and addresses of the paternal grandparents. 3. Court Investigator's Report indicates Anne Sinawski in the step-grandmother. Need name and address of the biological maternal grandmother. 4. Need proof of 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. Paternal grandparents b. Maternal grandmother. 5. If Court does not dispense with notice to the father, he will need to be personally served.
		Please see petition for details.	
		Court Investigator Report filed on 5/18/15.	
Cont. from			
	Aff.Sub.Wit.		
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	Video Receipt		
✓	CI Report		
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	Aff. Posting		
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	FTB Notice		
			Reviewed by: KT
			Reviewed on: 5/20/15
			Updates: 5/22/15
			Recommendation:
			File 17 - Sinawski

		<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS:
		<p>LAURA CASTILLO, mother, is Petitioner and requests appointment as Guardian of the Estate with bond set at \$10,000.00.</p> <p>Father: MARCUS AREYANO – deceased</p> <p>Paternal grandfather: GERALD AREYANO – deceased Paternal grandmother: PATTY ROMO</p> <p>Maternal grandfather: EFREN CASTILLO Maternal grandmother: GLORIA RUIZ</p> <p>Siblings: LANAE AREYANO, EMILY AREYANO – both served by mail on 04/30/15</p> <p>Petitioner states that the minor is a beneficiary of 1/3 of his father's estate, including a 1/3 interest in real property. It is not anticipated that there will be any cash distribution.</p> <p><u>Estimated Value of the Estate:</u> Personal property - \$4,833.00</p>	<p><u>Continued to 6/25/15</u> at the request of the attorney.</p> <p>1. Need proof of service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of Minor or Consent & Waiver of Notice or Declaration of Due Diligence</i> for:</p> <ol style="list-style-type: none"> Joshua Areyano – <i>personal service needed</i> Patty Romo (paternal grandmother) – <i>service by mail sufficient</i> Efren Castillo (maternal grandfather) - <i>service by mail sufficient</i> Gloria Ruiz (maternal grandmother) - <i>service by mail sufficient</i> <p>Note: It is the practice of this court to require monetary distributions to be placed in a blocked account.</p> <p>Note: If the Petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Tuesday, June 23, 2015 at 9:00am in Dept. 303 for filing of the bond; Tuesday, September 22, 2015 at 9:00am in Dept. 303 for filing of the Inventory & Appraisal; and Tuesday, July 19, 2016 at 9:00 am in Dept. 303 for filing of the First Account.
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 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 type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report n/a		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
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<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: JF	
		Reviewed on: 05/19/15	
		Updates: 05/22/15	
		Recommendation:	
		File 18 - Areyano	

		<u>GENERAL HEARING: 07/14/15</u>	NEEDS/PROBLEMS/COMMENTS:
		DIANA HARTMAN , maternal grandmother, is Petitioner.	1. Need <i>Notice of Hearing</i> . 2. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: a. Father b. Dezzery Hartman Jacobson (mother)
Cont. from		Father: UNKNOWN	
<input type="checkbox"/>	Aff.Sub.Wit.	Mother: DEZZERY HARTMAN JACOBSON	
<input checked="" type="checkbox"/>	Verified	Paternal grandparents: UNKNOWN	
<input type="checkbox"/>	Inventory	Maternal grandfather: RICK JACOBSON	
<input type="checkbox"/>	PTC	Petitioner states [see Petition for details].	
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
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<input checked="" type="checkbox"/>	Duties/Supp		
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<input type="checkbox"/>	CI Report		
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<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: JF
			Reviewed on: 05/19/15
			Updates:
			Recommendation:
			File 19 – Hartman

Petitioner: Eugenia A. Palacio (pro per)

Guardian: Esperanza Gonzalez (pro per)

Guardian: Belen Gonzalez (pro per)

Petition for Termination Guardianship

		<p>EUGENIA ARREDONDO PALACIO, mother, is petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service of the Notice of Hearing on: <ol style="list-style-type: none"> a. Esperanza Gonzalez (guardian) b. Belen Gonzalez (guardian) c. Isaac Cerda Jr. (minor) d. Marcus Cerda (minor) e. Isaac Cerda (father) f. Teodoro Cerda (paternal grandfather) g. Maria Arredondo (maternal grandmother)
		<p>BELEN GONZALEZ, paternal step-grandfather, and ESPERANZA GONZALEZ, paternal grandmother, were appointed guardians on 3/15/11.</p>	
Cont. from		<p>Please see petition for details.</p>	
	Aff.Sub.Wit.		
✓	Verified	<p>Court Investigator Report filed on 5/5/15.</p>	
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			<p>Reviewed by: KT</p>
			<p>Reviewed on: 5/20/15</p>
			<p>Updates:</p>
			<p>Recommendation:</p>
			<p>File 20 – Cerda</p>

21 Ariel Wagner (GUARD/P) Case No. 15CEPR00511

**Atty Kharazi, H. Ty (for Kathy A. Robinson and Ronald Robinson – Petitioners – Paternal Grandparents)
Petition for Appointment of Temporary Guardian of the Person (Prob.C.2250)**

		<u>GENERAL HEARING 07/15/2015</u>	NEEDS/PROBLEMS/COMMENTS:
		KATHY ANN ROBINSON, and RONALD ROBINSON , paternal grandparents, are petitioners.	<ol style="list-style-type: none"> 1. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Temporary Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Chambrosia Stephens-Wagner (Mother) – Unless the Court dispenses with notice. 2. Need Order.
		<u>Please see petition for details</u>	
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/	
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<input type="checkbox"/>	Pers.Serv.	x	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
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<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	x	
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<input type="checkbox"/>	Status Rpt		
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<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: LV
			Reviewed on: 05/21/2015
			Updates:
			Recommendation:
			File 21 - Wagner

Petition for Letters of Administration; Authorization to Administer Under IAEA

DOD: 2/28/13		<p>BARBARA ARNOLD, Sister, is Petitioner and requests appointment as Administrator with Full IAEA without bond.</p> <p>Full IAEA – ok</p> <p>Decedent died intestate</p> <p>Residence: Fresno Publication: Fresno Bee</p> <p>Estimated value of estate: Real property: \$200,000.00</p> <p>Probate Referee: Steven Diebert</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> Monday, June 29, 2015 for filing of bond, if required Monday, October 19, 2015 for filing the Inventory and Appraisal Monday, August 22, 2016 for filing the first account or petition for final distribution <p>If the proper items are on file prior to the status dates pursuant to Local Rule 7.5, the status hearings may come off calendar.</p>	
Cont from 051515				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
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<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
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<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
Reviewed by: skc				
Reviewed on: 5/19/15				
Updates:				
Recommendation:				
File 22 - Conroy				

23 Miguel A. Lopez & Jessie L. Lopez (GUARD/P) Case No. 14CEPR00492
Pro Per Lopez, Mayra (Petitioner – Mother)

Petition for Termination of Guardianship

		Mayra Lopez, mother, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		<u>Please see petition for details</u>	
			<p>Minute Order of 05/19/2015: The Court will allow Mayra Lopez to notice Jose Lopez, maternal grandfather, by phone.</p> <p>1. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Termination of Guardianship or consent and waiver of notice or declaration of due diligence for:</p> <ul style="list-style-type: none"> • Jose Lopez (Maternal Grandfather)
Cont. from 042815, 051915			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w/	
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	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LV
			Reviewed on: 05/20/2015
			Updates:
			Recommendation:
			File 23 - Lopez

DOD: 8/7/10	JOHN P. MCCANN and COLLEEN E. DEMPSEY , Co-Executors with Full IAEA without bond, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:	
	I&A Partial No. 1 (Corrected) filed 2/18/15 indicates \$64,134.87 cash plus various securities and an annuity contract, for a total of \$446,813.85.	<p><u>This matter is set for 3:30 pm in Dept. 502.</u></p> <p>Note: Objections filed 3/24/15 by Objectors Kathleen M. Whitehurst, Kevin J. McCann and Timothy J. McCann request that the petition be denied and that the Court instruct Petitioners to prepare and file a complete account current and report of their administration of the estate. Declaration of William J. Keeler in Support of Objections was also filed on 4/13/15.</p> <p>Note: The Co-Executors have now filed their First Account. See Page B.</p>	
	I&A Partial No. 2 (Final) filed 2/28/14 indicates an additional \$31,737.23 in cash.		
	Supplemental I&A filed 4/22/15 includes the \$1,200,000.00 claim against Daniel McCann		
	Total Inventory and Appraisal Value: \$1,678,551.08		
	Petitioners state they are holding a balance of \$525,773.97, of which \$368,334.12 is in cash. Cash of \$200,000.00 can be distributed to John P. McCann and Colleen E. Dempsey as Co-Trustees of the Surviving Trustor's Trust in accordance with the decedent's will without loss to creditors or injury to the estate of any interested person. The Surviving Trustor's Trust is the sole beneficiary of the estate and the aggregate of all property distributed does not exceed 50% of the net value of the estate. The value of the amount remaining in the hands of the personal representatives after the preliminary distribution will be \$325,773.97, which is more than sufficient to pay all commissions, fees and costs of administration.		
	The estate is not in a position to close because the personal representatives are waiting for a final determination of the claim against Daniel J. McCann for monies alleged to have been taken by Mr. McCann from the decedent filed in the trust matter 11CEPR00871. The monies may belong to the decedent's estate.		
	No prior distributions have been made in this matter. Petitioners request the Court waive bond under §11622.		
	Petitioners pray for an order of this Court as follows:		
	1. That cash in the amount of \$200,000.00 be ordered distributed to John P. McCann and Colleen E. Dempsey, Co-Trustees of the Surviving Trustor's Trust, the sole beneficiary of the estate;		
	2. That no bond will be required of the distributed in this matter;		
	3. The costs of this proceeding be ordered paid by the estate; and		
	4. Such further orders as the Court may deem proper.		
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
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<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
Reviewed by: skc			
Reviewed on: 5/20/15			
Updates:			
Recommendation:			
File 1 - McCann			

Petition for Settlement of First Account Current (Probate Code §10900)

DOD: 8/7/10	JOHN P. MCCANN and COLLEEN E. DEMPSEY , Co-Executors with Full IAEA without bond, are Petitioners.	NEEDS/PROBLEMS/ COMMENTS:
	Account period: 8/7/10 – 12/31/14	<p><u>This matter is set for 3:30 pm in Dept. 502.</u></p> <p><u>Note:</u> This petition was originally set with the hearing date “TBD.” At the last hearing on the Petition for Preliminary Distribution, the Court set the hearing date for this petition for 5/26/15. See Minute Order of 4/22/15.</p>
	Accounting: \$1,784,748.82	
	Beginning POH: \$1,728,551.08 (Total I&A value – see below)	
	Ending POH: \$1,775,773.97 (consisting of \$368,334.12 cash plus mutual funds valued at \$157,439.85 and claim against Daniel McCann valued at \$1,200,000.00)	
	I&A Partial No. 1 (Corrected) filed 2/18/15 indicates \$64,134.87 cash plus various securities and an annuity contract, for a total of \$446,813.85.	
	I&A Partial No. 2 (Final) filed 2/28/14 indicates an additional \$31,737.23 in cash.	
	Supplemental I&A filed 4/22/15 includes the \$1,200,000.00 claim against Daniel McCann under Probate Code §850 in this estate 13CEPR00437	
	Petitioners state they believe there are also retirement savings through the United Airlines Management and Administrative 401K Plan held by Fidelity Investments that may belong to the estate. Value \$69,838.64 as of 12/31/14.	
	Petitioners have taken actions under IAEA including closing accounts and moving monies into an estate account, and collecting the benefits from the annuity contract and deposited the proceeds into an estate account. Petitioners were advised by the transfer agent that certain shares of United Continental Holdings (formerly UAL Corporation) were invalidated pursuant to a 2002 bankruptcy filing.	
	Petitioners pray for an order:	
	1. Settling, allowing and approving the first account as filed;	
	2. Ratifying, approving and confirming all acts, transactions and proceedings of the Co-Executors;	
	3. The costs of this proceeding be ordered paid by the estate; and	
	4. Such further orders as the court may deem proper.	
<input type="checkbox"/>	Aff.Sub.Wit.	
<input checked="" type="checkbox"/>	Verified	
<input checked="" type="checkbox"/>	Inventory	
<input checked="" type="checkbox"/>	PTC	
<input checked="" type="checkbox"/>	Not.Cred.	
	Notice of Hrg	
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	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
<input checked="" type="checkbox"/>	Letters 11/4/13	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
<input checked="" type="checkbox"/>	9202	
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	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
<input checked="" type="checkbox"/>	FTB Notice	
		Reviewed by: skc
		Reviewed on: 5/20/15
		Updates: 5/22/15
		Recommendation:
		File 1 - McCann

