



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.

Third Account and Report of Conservator; Petition for Its Approval; For Withdrawal of Funds from Blocked Account; and for Allowance of Fees and Reimbursement of Costs.

		<p>LOUIS McPHERAIN, grandson and Conservator of the person and estate, is Petitioner.</p> <p>Account period: 2/19/14 – 2/18/16</p> <p>Accounting - \$507,049.49 Beginning POH - \$479,335.97 Ending POH - \$418,530.04 <i>(\$380,780.04 is cash)</i></p> <p>Conservator - waives <i>(health insurance premium paid by Conservatorship in lieu of commissions; total of \$8,148.58 paid during this account period;)</i></p> <p>Attorney - \$7,363.00 <i>(per Declaration and itemization attached for 37.90 paralegal hours @ \$140.00/hr. and 4.20 attorney hours @ \$280.00/hr., plus costs of \$881.00 for filing fees and certified copies.;)</i></p> <p>Bond - \$42,000.00 <i>(sufficient)</i></p> <p style="text-align: center;">Please see additional page</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Judicial Council form Order for Withdrawal of Funds from Blocked Account.</p> <p>Note: Court will set status hearing as follows:</p> <ul style="list-style-type: none"> Wednesday, May 9, 2018 at 9:00 a.m. in Dept. 303 for the third accounting. <p>Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.</p>
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
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	Conf. Screen		
	Letters		
	Duties/Supp		
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	Video Receipt		
✓	CI Report		
✓	2620(c)		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			<p>Reviewed by: KT</p> <p>Reviewed on: 5/26/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1- Dix</p>

Petitioner requests:

1. In lieu of Conservator fees, that the Court continue to allow payment of, and to approve the payments made during the account period totaling **\$8,148.58**, for Petitioner's health insurance premiums because he is not employed elsewhere and cannot afford such coverage; and
2. Authorization to withdraw the sum of **\$17,089.10** at this time from the blocked account to cover a portion of the remaining **\$12,710.00** expenses (*annual 2016 expenses estimated at \$39,239.00*) anticipated for March 2016 through March 2017.

Petitioner prays for an order:

1. Settling and allowing the Third Account;
2. Approving and confirming all acts and transactions of the Conservator relating to the conservatorship during this account period;
3. Authorizing the Attorney fees and costs;
4. Authorizing Petitioner to continue paying the Conservatorship estate the Petitioner's monthly medical and dental insurance costs; and
5. Authorizing Petitioner to withdraw the sum of **\$17,089.10** from the blocked account to be used toward net expenses of the Conservatorship for March 2016 through December 2016.

Court Investigator Report filed 9/18/2015 recommends the conservatorship continue as is with the current Conservator.

Petition for Termination of Guardianship

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 4/5/16</u> : Examiner notes provided in open court. 1. Need proof of service of Notice of Hearing at least 15 days prior to the hearing on the minor, guardian, and all relatives listed in the petition per Probate Code §1460(b)(5): - LaDaijah Nichols (minor) - LaGanda Johnson (guardian) - Oliver Nichols (father), unless dispensed - Eddie Jenkins (paternal grandfather), unless dispensed - Maternal grandfather, unless dispensed <u>Note</u> : Proof of service on Guardian LaGanda Johnson is incomplete re the server's information.	
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<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
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<input type="checkbox"/>	Status Rpt			
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<input type="checkbox"/>	Citation			
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Reviewed by: skc				
Reviewed on: 5/25/16				
Updates:				
Recommendation:				
File 2- Nichols				

3 Sergio Regino Guerrero (GUARD/P)

Case No. 12CEPR01066

Petitioner Ayala, Susannha (Pro Per – Mother)

Petition for Termination of Guardianship

Age: 3	SUSANNHA AYALA, mother, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	<u>Please see petition for details</u>	
Cont. from		<ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment for Termination of Guardianship for: <ul style="list-style-type: none"> • Maria Luisa Rodriguez (co-guardian) • Aciano Chano Rodriguez (co-guardian) • Mateo Guerrero (Father) • Regino Guerrero (Paternal Grandfather) • Paternal Grandmother (not listed) • Jose L. Ayala (Maternal Grandfather) • Maria Ayala (Maternal Grandmother)
<input type="checkbox"/> Aff.Sub.Wit.		
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<input type="checkbox"/> Notice of Hrg	x	
<input type="checkbox"/> Aff.Mail	x	
<input type="checkbox"/> Aff.Pub.		
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<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
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<input type="checkbox"/> Video Receipt		
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<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LV
		Reviewed on: 05/25/2016
		Updates:
		Recommendation:
		File 3- Guerrero

Attorney Nancy J. LeVan (for Petitioner Gary Morris, Jr., Beneficiary)
 Attorney Jennifer Walters (for Walter A. Morris, Successor Trustee)

Petition to Compel Accounting by Trustee of the Gary F. Morris, Sr. 2013 Trust and Petition for Distribution of Trust Assets to Doug Standing, Trustee of the Gary Morris, Jr. Trust and Petition for Fees and Costs

DOD: 10/19/2013	GARY MORRIS, JR. , Beneficiary, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Petitioner states:	Page 5B is a Fee Waiver Review.
	<ul style="list-style-type: none"> WALTER A. MORRIS was appointed as Successor Trustee of the GARY F. MORRIS, SR., 2013 TRUST on 4/1/2014 [copy of Trust attached as Exhibit A to Declaration of Clerical Error and Omissions filed 10/2/2015]; The GARY F. MORRIS, SR., 2013 TRUST terms provide that the balance of the Trust estate, including all assets poured into the Trust as a result of Trustor's death, is to be distributed to BARBARA TURNER, Trustee of the GARY F. MORRIS, JR., TRUST; BARBARA TURNER resigned as Trustee of both Trusts, and WALTER A. MORRIS was appointed as Successor Trustee; Petitioner requests the Court compel WALTER A. MORRIS, as Trustee of the GARY F. MORRIS, SR., 2013 TRUST, to distribute the remaining assets in the GARY F. MORRIS, SR., 2013 TRUST to DOUG STANDING, Trustee of the GARY F. MORRIS, JR., TRUST within 30 days of the order approving this petition; GARY F. MORRIS, SR., 2013 TRUST terms provide that the Trustee shall periodically, but not less than once each year, render an account of its administration of the Trust(s) under the Trust instrument to all current income beneficiaries; GARY F. MORRIS, SR's., date of death is 10/9/2013 [sic]; WALTER A. MORRIS was appointed as Successor Trustee on 4/1/2014; to date, no accounting has been received from WALTER A. MORRIS. ~Please see additional page~ 	<p>Continued from 5/3/2016. Minute Order states Ms. Walters called the Court this morning to advise of her inability to appear today; her office asked Ms. LeVan to request a continuance.</p> <p>Notes for background:</p> <ul style="list-style-type: none"> Minute Order dated 3/15/2016 from a previous hearing states counsel is in disagreement as to what has been provided. If all of the information has not been provided by 5/3/2016, then Walter Morris is ordered to be personally present or present via CourtCall on 5/3/2016. Walter Morris did not appear in Court. Minute Order dated 1/5/2016 from the a previous hearing states Ms. Walters represents that there have been continued difficulties in obtaining the bank statements, but the accounting is otherwise completed and ready for filing. Ms. LeVan agrees to the accounting being filed without the missing statements; Ms. Walters will proceed with the filing. Court records do not show an accounting has been filed as of 5/25/2016.
Cont. from 100615, 111715, 010516, 020916, 031516, 050316		
Aff.Sub.Wit.		
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Video Receipt		
CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LEG
		Reviewed on: 5/25/16
		Updates:
		Recommendation:
		File 5A – Morris

Petitioner prays the Court Order:

1. An accounting from **WALTER A. MORRIS** from the period when he was Successor Trustee of the **GARY F. MORRIS, SR., 2013 TRUST** from 4/1/2014 until 8/31/2015;
2. **WALTER A. MORRIS**, Successor Trustee of the **GARY F. MORRIS, SR., 2013 TRUST**, [shall] distribute all of the remaining assets in the **GARY F. MORRIS, SR., 2013 TRUST** to **DOUG STANDING**, Trustee of the **GARY F. MORRIS, JR., TRUST** within 30 days of the signed of the order approving this *Petition*;
and
3. Allowing attorney fees and costs to Petitioner to be paid by Walter Morris for failure to file accounting and distribute assets pursuant to **GARY F. MORRIS, SR., 2013 TRUST** terms.

Notes:

- Filing fee of **\$435.00** is currently due from Petitioner, who filed the *Petition* using a fee waiver, which is pending. The **\$435.00** filing fee is appropriately payable from Trust assets. *Declaration of Clerical Error and Omissions* filed 10/2/2015 states Petitioner agrees that a filing fee should be paid by Walter Morris, Trustee of the **GARY F. MORRIS, SR., 2013 TRUST**; however, Walter Morris is not communicating with the beneficiary, Gary Morris, Jr., his attorney, nor the Successor Trustee of the **GARY F. MORRIS, JR., TRUST**; the beneficiary has no access to funds of the Trust.
- *Order Setting Bond Amount* filed 4/25/2015 set bond at **\$286,000.00**, proof of which was filed on 5/9/2014. *Order Reducing Bond Amount* filed 5/13/2015 finds that the bond amount for **WALTER A. MORRIS**, as Trustee of the **GARY F. MORRIS, SR., 2013 TRUST** is reduced to **\$152,137.88**, which is the amount of net proceeds [distributed to the seller of the Trust real property] plus **10%**.
- *Declaration of Clerical Error and Omissions* filed 10/2/2015 attaches as *Exhibit B* a copy of the Bond renewal that was mailed to Walter Morris, and states it is unknown what Walter Morris did with it.
- *Order on Ex Parte Petition for Payment of Allowance to Gary Morris, Jr. for Housing Pursuant to Article 2, Section 2.04(D) of the Gary Morris, Sr. Revocable Trust dated 9/3/2013* filed on 1/29/2016 was withdrawn and dismissed on 3/10/2016.

Attorney Nancy J. LeVan (for Petitioner Gary Morris, Jr.)

Fee Waiver Review

DOD: 10/19/2013		NEEDS/PROBLEMS/COMMENTS: <u>Continued from 5/3/2016.</u>
Cont. from 100615, 111715, 010516, 020916, 031516, 050316		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
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<input type="checkbox"/>	Notice of Hrg	
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<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: LEG
		Reviewed on: 5/25/16
		Updates:
		Recommendation:
		File 5B – Morris

Probate Status Hearing RE: Filing of the Inventory and Appraisal

DOD: 12/28/2014	VELIA JUAREZ , daughter, was appointed Executor with full IAEA without bond on 11/12/2015.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR.</u> Supplement to I&A filed 5/17/2016.</p>
	Letters issued 11/16/2015.	
Cont. from 041916		
<input type="checkbox"/> Aff.Sub.Wit.	Minute order dated 11/12/2015 set this status hearing re: the filing of the inventory and appraisal.	
<input type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory		
<input checked="" type="checkbox"/> PTC	Inventory and appraisal was filed 3/15/2016.	
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
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<input checked="" type="checkbox"/> Sp.Ntc.	w/	
<input type="checkbox"/> Pers.Serv.		
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<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: SEF
		Reviewed on: 5/25/2016
		Updates:
		Recommendation:
		File 7- Juarez

Attorney Kruthers, Heather H. (for Public Guardian)

Amended First and Final Account and Report of Temporary Conservator; Petition for Allowance of Compensation to Temporary Conservator and Her Attorney

	FRESNO COUNTY PUBLIC GUARDIAN, Former Temporary Conservator of the Person and Estate, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:	
	Account period: 5/19/15 – 11/16/15 Accounting: \$179,370.94 Beginning POH: \$153,595.06 Ending POH: \$ 19,452.06 (\$18,252.06 cash plus misc. personal property, two vehicles.)		
	Public Guardian: \$14,236.56 (for 104.74 Deputy hours @ \$96/hr and 55.02 Staff hours @ \$76/hr itemized at Exhibit B)		
	Attorney: \$2,500.00 (Local Rule 7.16(B)(1))		
	Bond fee: \$25.00		
	Costs: \$539 (filing plus certified copies)		
	After payment of allowed commissions, fees and costs totaling \$17,300.56, Petitioner requests authority to distribute the remaining cash of \$951.50 and personal property to Kenneth Kearns, the successor conservator.		
	Petitioner prays for an order:		
	1. Approving, allowing and settling the First and Final Account and Report;		
	2. Authorizing payment of the conservator's and attorney's compensation;		
	3. Authorizing payment of the bond fee and costs;		
	4. For distribution as set forth above; and		
	5. Any other orders the Court considers proper.		
			Reviewed by: skc
			Reviewed on: 5/25/16
			Updates:
			Recommendation:
			File 8- Walters
<input type="checkbox"/>	Aff.Sub.Wit.		
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<input type="checkbox"/>	CI Report		
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<input type="checkbox"/>	FTB Notice		

		<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p><u>OFF CALENDAR</u> Receipt filed 5/10/16.</p>
Cont. from 040516		
Aff.Sub.Wit.		
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Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 5/25/16
		Updates:
		Recommendation:
		File 9- In

Probate Status Hearing RE: Filing of the Inventory and Appraisal

DOD: 11/27/2014	ZEPURE "ZEPPY" ATTASHIAN , attorney and named executor, was appointed Executor with full IAEA without bond on 11/12/2015.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute order dated 4/19/2016</u> continued this matter to 5/31/2016 and states counsel requests time to address the defects. No appearance is necessary at the status hearing if the I&A is filed at least two court days prior.</p> <p>1. Need inventory and appraisal or 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>
	Letters issued 11/16/2015.	
Cont. from 041916		
Aff.Sub.Wit.		
Verified		
Inventory	x	
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
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Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: SEF
		Reviewed on: 5/25/2016
		Updates:
		Recommendation:
		File 10- Bongardt

Petitioner Castillo, Valerie (Pro Per – maternal aunt)

Petition for Appointment of Guardian of the Person

		<p>TEMPORARY EXPIRES 01/26/16; extended to 3/22/2016; extended to 4/19/2016; extended to 5/31/2016</p> <p>VALERIE CASTILLO, maternal aunt, is Petitioner.</p> <p align="center">~Please see Petition for details~</p> <p>Objection to Guardianship filed 10/22/15 by Patricia Castillo.</p> <p>Court Investigator filed a report on 11/23/15.</p> <p>Court Investigator's Supplemental Report filed 11/24/15.</p> <p>Declaration of Patricia Castillo filed 11/25/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order dated 4/19/2016 from the hearing on the Order to Show Cause shows an appearance was made by Petitioner Valerie Castillo and by Patricia Castillo, mother. <i>Minute Order</i> states: Parties represent that Hiroki and Fujio Tokumoto, paternal grandparents of Keanna, are both deceased. The Court vacates the Order to Show Cause and grants one last continuance to cure the remaining defects.</p> <p>The following defects from the last hearing remain:</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 the Person</i> or <i>Consent & Waiver of Notice</i>, or <i>Declaration of Due Diligence</i>, for:</p> <ol style="list-style-type: none"> Keanna Tokumoto (proposed Ward, age 16); Byron Tokumoto (Keanna's father), <i>if Court does not find diligence per Declaration filed 3/25/16.</i> Will Bailey (Zoe's father), <i>if Court does not find diligence per Declaration filed 3/25/16.</i> Zoe's paternal grandparents; Ryan's paternal grandparents.
Cont. from 120115, 020216,032216, 041916			
<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"/> FTB Notice			
			Reviewed by: JF / LEG
			Reviewed on: 5/25/16
			Updates:
			Recommendation:
			File 11 – Tokumoto/Bailey/Castillo

Attorney Gary G. Bagdasarian (for Petitioner Connie Mekealian, Administrator)

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

DOD: 2/27/2014		<p>CONNIE MEKEALIAN, niece and Administrator appointed with Limited IAEA without bond, is Petitioner.</p> <p>Sale Price - \$129,500.00 Overbid - \$136,475.00</p> <p>Reappraisal - \$125,000.00 <i>(completed 1/25/2016)</i></p> <p>Property - 50% interest in property with APN 314-043-69 Sanger, CA 93657</p> <p>Publication - Business Journal <i>(filed 3/23/2016)</i></p> <p>Buyers - James F. Cook and Stacey M. Cook, as joint tenants</p> <p>Broker - \$7,770.00 <i>(6% payable to Realty Concepts)</i></p> <p>Blocked Account - Proceeds to be deposited at CA Bank and Trust <i>(proof of \$60,000.00 bond filed 5/2/2016 relative to previous sale of other real property)</i></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Order to Deposit Money into Blocked Account (Judicial Council form MC-355).</p> <p>Note: If Petition is granted, Court will set a status hearing as follows:</p> <ul style="list-style-type: none"> Thursday, July 7, 2016 at 9:00 a.m. in Dept. 303 for filing proof of sale proceeds deposited into a blocked account (<i>Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked Account</i>, mandatory-use Judicial Council form MC-356.) <p>Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the date listed, the hearing will be taken off calendar and no appearance will be required.</p>
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<input type="checkbox"/>	Aff.Sub.Wit.		
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<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order Need blocking order		
<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: LEG	
		Reviewed on: 5/25/16	
		Updates:	
		Recommendation:	
		File 12- Mekealian	

Petition for Appointment of Guardian of the Person (as to MYLEAH only)

		<u>NO TEMPORARY REQUESTED</u>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Petition is as to <u>MYLEAH</u> only.</p> <p><u>Minute order dated 4/19/2016</u> states petitioner is to make efforts to obtain the name of paternal grandfather and attempt to have him properly noticed. The Court will allow text message notice to Richard Wallace, maternal grandfather; the message must include all pertinent information. Matter was continued to 5/31/2016.</p> <ol style="list-style-type: none"> 1. Declaration of due diligence re: paternal grandfather filed 5/4/2016 includes a text message re: the 5/31/2016 court hearing. If the Court does not find the text message sufficient, the Court may require further notice to: <ol style="list-style-type: none"> a. Paternal grandfather 2. Declaration of due diligence re: Richard Wallace (maternal grandfather) filed 5/11/2016 includes two text messages re: the 5/31/2016 court hearing. If the Court does not find text messages sufficient, the Court may require further notice to: <ol style="list-style-type: none"> a. Richard Wallace (maternal grandfather)
		<p>PATRICIA RENEE CAIRNS, 2nd cousin, is petitioner.</p> <p>PATRICIA RENEE CAIRNS was appointed guardian of Layla Cairns (sister of minor) on 1/7/2016.</p> <p>Court Investigator report filed 4/12/2016.</p> <p><i>See petition for details.</i></p>	
Cont. from 041916			
<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 type="checkbox"/>	Notice of Hrg	x	
<input type="checkbox"/>	Aff.Mail	x	
<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 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 checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			<p>Reviewed by: SEF</p> <p>Reviewed on: 5/25/2016</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13A- Cairns, Hernandez & Prezter</p>

Petition for Appointment of Guardian of the Person (as to **MATTHEW** only)

		<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS:
		JENNIE SUE HART, 2 nd cousin, is petitioner.	Petition is as to <u>MATTHEW</u> only.
Cont. from 041916		Court Investigator report filed 4/12/2016	<u>Minute order dated 4/19/2016</u> states Court will allow text message notice to Richard Wallace, maternal grandfather; the message must include all pertinent information. Examiner notes provided in open court. Matter was continued to 5/31/2016.
	Aff.Sub.Wit.		
✓	Verified		<ol style="list-style-type: none"> 1. Proof of personal service filed 3/25/16 for Ray Mundo Segura (father) does not include the name, address and phone number of the person who served the documents. 2. Proofs of service filed 4/13/16 on paternal grandparents do not include the address of the person who served the documents. 3. Need proof of service 15 days prior to the hearing of <i>Notice of Hearing</i> with copy of petition <u>or</u> consents and waiver of notice for: <ol style="list-style-type: none"> a. Stephanie Pretzer (maternal grandmother) b. Richard Wallace (maternal grandfather) – <i>unless court dispenses with notice</i> 4. UCCJEA form is incomplete. Need residence information of minor from October 2010 through December 2015.
	Inventory		
	PTC		<i>See petition for details.</i>
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w/	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	w/	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: SEF
			Reviewed on: 5/25/2016
			Updates:
			Recommendation:
			File 13B- Cairns, Hernandez & Pretzer

Ex Parte Petition for Appointment of Guardian Ad Litem (Isabella Rose Anderson)

		<p>JAMES S. ANDERSON, Settlor, is Petitioner.</p> <p>Petitioner states he is the settlor of the trust and father of the minor child.</p> <p>Petitioner seeks appointment of CHRISTINE ANDERSON HOLT to represent the interests of the minor Isabella Rose Anderson to consent to modification of a trust under which the minor is the beneficiary. See Page A re details.</p> <p>Ms. Holt is the aunt of the minor and is a competent and responsible person to protect the interests of the minor. Baker Manock & Jensen, PC has represented Ms. Holt on other matters. Baker Manock & Jensen, PC is not representing her in this matter.</p> <p>See also Memorandum of Points and Authorities filed 4/19/16</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 3/8/16: Counsel will submit points and authorities as to the issue of Ms. Holt not being an attorney or represented by an attorney.</p> <p>Note: Memorandum of Points and Authorities filed 4/19/16 provides authority and discussion. Please see Memorandum of Points and Authorities filed 4/19/16 for details.</p> <p>Note: Minute Order 3/8/16 re Ex Parte Petition for Limiting the Class of Beneficiaries Whose Consent is Needed to Compel Modification of the Trust states the Court is not requiring the Motion to Compel; Petition granted.</p> <p>The following issues remain noted for reference:</p> <ol style="list-style-type: none"> 1. A person may not act as a guardian ad litem unless he or she is an attorney or is represented by an attorney. See Note below caption on Petition for Appointment Form DE-350. Petitioner states the proposed GAL is not represented by Baker Manock & Jensen PC. Need clarification re representation of Ms. Holt in connection with this matter. 2. Ms. Holt is the named successor trustee. The Court may require clarification or authority re possible conflict. 3. It appears Ms. Holt already signed a consent to modification of the trust as GAL on behalf of the minor beneficiary on 12/28/15; however, on that date she had not been appointed. If appointed, further consent may be appropriate.
Cont. from 030816, 042616			
<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		
<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 type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: skc	
		Reviewed on: 5/25/16	
		Updates:	
		Recommendation:	
		File 15A- Anderson	

**Amended Petition for Appointment of Guardian Ad Litem
 (Issue of Ava Elizabeth Anderson and Isabella Rose Anderson)**

	JAMES S. ANDERSON , Settlor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Petitioner states he is the settlor of the trust and father of the minor child.	Note: Minute Order 3/8/16 re Ex Parte Petition for Limiting the Class of Beneficiaries Whose Consent is Needed to Compel Modification of the Trust states the Court is not requiring the Motion to Compel; Petition granted.
Cont. from	Petitioner seeks appointment of ELIZABETH L. ANDERSON to represent the interests of: issue of Isabella Rose Anderson, Ava Elizabeth Anderson (sister to Isabella), and Petitioner's potential issue, to consent to modification of a trust under which the minor is the beneficiary. See Petition filed 1/7/16 and Order entered thereon on 3/8/16 for details.	The following issue remains noted for reference:
<input type="checkbox"/> Aff.Sub.Wit.		4. A person may not act as a guardian ad litem unless he or she is an attorney or is represented by an attorney. See Note below caption on Petition for Appointment Form DE-350.
<input checked="" type="checkbox"/> Verified		Petitioner states the proposed GAL is not represented by Baker Manock & Jensen PC. Need clarification re representation of Ms. Anderson in connection with this matter.
<input type="checkbox"/> Inventory		Note: Memorandum of Points and Authorities filed 4/19/16 provides authority and discussion re proposed GAL not being represented by an attorney.
<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.		
<input type="checkbox"/> Conf. Screen	Ms. Anderson is a competent and responsible person to protect the interests of the contingent beneficiaires. Baker Manock & Jensen, PC, has represented Ms. Anderson on other matters, but does not represent her in this matter.	
<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 checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		Reviewed by: skc
<input type="checkbox"/> Status Rpt		Reviewed on: 5/25/16
<input type="checkbox"/> UCCJEA		Updates:
<input type="checkbox"/> Citation		Recommendation:
<input type="checkbox"/> FTB Notice		File 15B- Anderson

Age: 3 months		<p align="center"><u>TEMPORARY EXPIRES 5/31/2016</u></p> <p>SANFORD THOMAS, maternal grandfather, is petitioner</p> <p align="center"><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Paternal Grandfather (Unknown) • Paternal Grandmother (Unknown) • Tiffany Morgan (Maternal Grandmother) 	
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 type="checkbox"/>	Notice of Hrg			x
<input type="checkbox"/>	Aff.Mail			x
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			n/a
<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 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 checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
Reviewed by: LV				
Reviewed on: 05/25/2016				
Updates:				
Recommendation:				
File 17- Thomas				

Petition for Appointment of Guardian of the Person

		<u>TEMPORARY EXPIRES 5/31/2016</u>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute order dated 4/7/2016</u> from temporary hearing dispenses with notice to Phillip Villanueva Jr. (father) as to the temporary petition. Petitioner is to Facebook message father with all the pertinent information for notice of the general hearing. The Court orders that visitation for Barbara Edwards (mother) shall occur as mutually agreed to by both parties.</p> <ol style="list-style-type: none"> 1. <i>Notice of Hearing</i> filed 5/23/2016 includes a copy of a text message addressed to "Phillip." If the Court does not find the text message sufficient, the Court may require further notice to: <ol style="list-style-type: none"> a. Phillip Villanueva, Jr. (father) 2. A copy of the petition was not served along with the <i>Notice of Hearing</i> filed 5/23/2016 on the adult siblings, as required per Probate Code 1511(a).
		<p>DAWNETTA SUZANNE REED, sister-in-law, is petitioner. (Petitioner is married to the minor's brother, Edward Curtis Reed, II.)</p> <p>Court Investigator report filed 5/26/2016.</p> <p><i>See petition for details.</i></p>	
Cont. from			
	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		
		Reviewed by: SEF	
		Reviewed on: 5/25/2016	
		Updates:	
		Recommendation:	
		File 18- Villanueva	

Petition for Appointment of Temporary Guardian of the Person

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 5/25/16	
			Updates: 5/26/16	
			Recommendation:	
			File 22- Moreno	

Petitioner: Kaelee Atteberry (Pro per – Half-sister)

Petition for Appointment of Temporary Guardian of the Person

		<u>GENERAL HEARING 7/19/2016</u>	NEEDS/PROBLEMS/COMMENTS:	
		<p>KAELEE M. ATTEBERRY, half-sister, is petitioner (and resides in El Paso, Texas)</p>	<p>1. Need <i>Duties of Guardian</i> (Judicial Council Form GC-248) signed by petitioner.</p>	
Cont. from		<p><i>See petition for details.</i></p>		
<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 type="checkbox"/>	Notice of Hrg			n/a
<input type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			x
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<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			
			Reviewed by: SEF	
			Reviewed on: 5/25/2016	
			Updates:	
			Recommendation:	
			File 23- Hawkins	

Petition for Settlement of Second Account Current and Report of Trustee; and for Approval of Attorney's Fees and Costs

		BRUCE D. BICKEL , Trustee, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 5/24/16: If the late-filed paperwork cures the defects, the Court is prepared to sign the order and 5/31/16 can come off calendar.</p> <ol style="list-style-type: none"> The Trustee's invoices include expenses including postage and photocopies, which are considered by the Court to be costs of doing business and not reimbursable pursuant to Local Rule 7.17. The Court may require reimbursement to the trust of \$90.95. The Court's order of 4/4/13 authorized payment of trustee fees at a rate of \$150/hr; however, the invoices reflect numerous lines at a billing rate of \$175/hr. See invoices dated 10/30/14, 11/26/14, 3/30/15, 4/30/15, and 12/31/15. The Court may require recalculation of the trustee's fees and reimbursement of the difference to the trust. The Trustee's invoices do not appear to show who performed each service and the petition does not appear to include a statement of the hourly rate of each person per Cal. Rule of Court 7.702, 7.751. <p>Note: If granted, the Court will set a status hearing for the filing of the next accounting as follows:</p> <ul style="list-style-type: none"> Tuesday, May 1, 2018 for the filing of the Third Account.
		<p>Account period: 5/1/14 – 2/29/16</p> <p>Accounting: \$293,278.20 Beginning POH: \$279,029.59 Ending POH: \$271,524.28 (\$76,335.17 cash)</p>	
Cont. from 052416		<p>Trustee: \$6,850.42 (paid, per Order of 4/4/13 authorizing monthly payments of fees @ \$150.00 per hour not to exceed \$1,000.00 per month; see invoices attached at Exhibit C. Petitioner states services were provided by Trustee Bruce Bickel as well as Matt Bickel Fiduciary Support Services and staff.)</p> <p>Attorney: \$2,269.50 (reduced from \$4,591.50, plus filing fee of \$200.00; see Declaration filed 4/12/16 for itemization and Declaration filed 5/2/16 re reduction)</p> <p>Bond: \$339,900.00 (sufficient)</p> <p>Petitioner prays for an order:</p> <ol style="list-style-type: none"> Settling, allowing, and approving the second account and report as filed, and ratifying, approving and confirming all acts and transactions of Petitioner as set forth in it, or relating to matters set forth in it; Authorizing and directing Petitioner to pay his attorney fees and costs in the amount of \$2,522.00; and Such other and further orders as the Court may deem proper. 	
<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		
<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 type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	2620(c)		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			<p>Reviewed by: skc</p> <p>Reviewed on: 5/25/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 25- Lopez-Aita</p>

Attorney Robert E. Bergin, Jr. (for Petitioner Scott James Andersen)

First and Final Report of Administrator on Waiver of Accounting, Petition for Final Distribution and for Allowance of Attorneys' Fees and Commissions

DOD: 8/19/2013		<p>SCOTT JAMES ANDERSEN, nephew and Administrator with Will Annexed, is Petitioner.</p> <p>Accounting is waived.</p> <p>I & A — \$215,000.00 POH — \$262,990.75 (\$197,990.75 is cash)</p> <p>Administrator — \$3,650.00 (less than \$8,900.00 statutory fee;)</p> <p>Attorney — \$3,650.00 (less than \$8,900.00 statutory fee;)</p> <p>Costs — \$435.00 (filing fee)</p> <p>Distribution pursuant to Decedent's Will is to:</p> <p>PATRICIA JOAN ANDERSEN – \$190,255.75 cash, and entire interest in real property.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need revised proposed.</p>
Cont. from 052416			
<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.		
<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 type="checkbox"/>	Letters 021015		
<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 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: LEG	
		Reviewed on: 5/25/16	
		Updates:	
		Recommendation:	
		File 26- Andersen	

Order to Show Cause

	PAEK LEE, Mother, was appointed Conservator of the Person on 9/25/13.	NEEDS/PROBLEMS/COMMENTS: Minute Order 5/24/16: Paek Lee called to report that she was ill and unable to attend today's hearing. The OSC is not vacated and Paek Lee is ordered to be personally present in Court or present via CourtCall on 5/31/16. 1. Need proof of establishment of conservatorship or equivalent in Delaware pursuant to Probate Code §2352 or written status report per Local Rule 7.5.
	On 1/5/16, the Court granted the Conservator's Petition to Fix Residence Outside the State of California to an address in Delaware and set status hearing for 4/5/16 the filing of a conservatorship or equivalent proceeding in Delaware.	
	On 4/5/16, there were no appearances and the Court set this Order to Show Cause to Paek Lee as to why she should not be removed as Conservator for her failure to provide proof of a conservatorship or its equivalent in Delaware.	
Cont. from 052416		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 5/25/16
		Updates:
		Recommendation:
		File 27- Smith