



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.

Attorney: Lisa M. Horton, for Conservator Kendra L. Brenson

Status Hearing Re: Establishment of Conservatorship in Texas; Final Account

	<p>KENDRA L. BRENSON, sister, was appointed Successor Conservator of the Person and Estate on 8/2/2007.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
<p>Cont. from 101614, 121514, 020915, 051215, 051215</p>	<p>Order Fixing Residence Outside the State of California filed on 6/18/2014 finds the residence of the Conservatee shall be <i>[street address omitted]</i>, Conroe, Texas; and that conservatorship of the person and estate or its equivalent shall be commenced in the state of new residence within 4 months of the date of this order. Four months from the date of the <i>Order Fixing Residence</i> expired on 10/18/2014.</p>	<p>Continued from 5/12/2015.</p>
<p>Aff.Sub.Wit.</p>	<p>Status Hearing Report filed by Attorney Lisa Horton on 5/28/2015 states:</p>	<p>Note for background: <i>Minute Order</i> dated 4/6/2015 states the Court grants a 30 day continuance, but Counsel is to start inquiries regarding the Conservatorship in Texas immediately.</p>
<p>✓ Verified</p>	<ul style="list-style-type: none"> On 5/7/2015, she mailed the exemplified copy of the Court file to the Texas attorney; On 5/11/2015, she called the paralegal at the Texas firm; she received an email from the paralegal on 5/12/2015, stating that they will file the exemplified copy with the Court that day, and they anticipated getting a hearing date on 5/21 or 5/28 (<i>copy of email attached</i>); On 5/20/2015, she emailed the paralegal and received on response; 5/22/2015, she emailed the paralegal again on 5/22/2015 for the status, and she replied that the Texas guardianship <i>[the Texas term for conservatorship]</i> hearing was 6/18/2015 (<i>copy of email attached</i>); She changed the ending date of the final accounting to 6/19/2015 and needs the May statement from Wells Fargo to complete the accounting; She requests a continuance to 7/7/2015 for the filing of the final accounting and proof that her client was appointed as guardian in Texas. 	<p>The following issues from the last hearing remain:</p>
<p>Inventory</p>		<ol style="list-style-type: none"> Need proof of the establishment of conservatorship of the person and estate or its equivalent in the State of Texas. Need Second and Final account of the conservatorship pursuant to Probate Code § 2620 et seq.
<p>PTC</p>		
<p>Not.Cred.</p>		
<p>Notice of Hrg</p>		
<p>Aff.Mail X</p>		
<p>Aff.Pub.</p>		<p>Reviewed by: LEG</p>
<p>Sp.Ntc.</p>		<p>Reviewed on: 5/28/15</p>
<p>Pers.Serv.</p>		<p>Updates: 5/28/2015</p>
<p>Conf. Screen</p>		<p>Recommendation:</p>
<p>Letters</p>		<p>File 1 - Harris</p>
<p>Duties/Supp</p>		
<p>Objections</p>		
<p>Video Receipt</p>		
<p>CI Report</p>		
<p>9202</p>		
<p>Order</p>		
<p>Aff. Posting</p>		
<p>✓ Status Rpt</p>		
<p>UCCJEA</p>		
<p>Citation</p>		
<p>FTB Notice</p>		

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Proof of guardianship in Green County, Missouri filed 5/27/15.</p>
Cont. from 071814, 111814, 010615, 051215		
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: 5/27/15
		Updates: 5/28/15
		Recommendation:
		File 2 – Lanier

		DAVID A. ROBERTS , Attorney for Former Conservator David J. St. Louis, and subsequently Former Successor Conservator Joan St. Louis, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
			Note: A status hearing re filing the final account of the former conservator (Petitioner's client) was continued to 6/12/12. Pursuant to Cal. Rule of Court 7.752, the Court may require accounting prior to authorizing compensation.
			Note: This matter was originally set for 5/5/15, but was continued to 6/2/15 at Petitioner's request.
Cont. from 050515		Petitioner has previously requested and been paid a total of \$29,414.00 for work from October 2011 through December 2013.	<ol style="list-style-type: none"> 1. Need Notice of Hearing and proof of service of Notice of Hearing at least 15 days prior to the hearing on all parties entitled to notice pursuant to Probate Code §§ 2640, 1460. 2. Petitioner requests compensation from the conservatorship estate for services in connection with the conservatee's trust. The Court may require clarification or payment from the trust rather than the conservatorship estate.
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC		Petitioner requests compensation in the total amount of \$52,217.10 consisting of fees of \$50,120.00 and costs of \$2,097.10 for the period 1/1/14 through 2/20/15.	
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Aff.Mail	<input checked="" type="checkbox"/>	Services include numerous attorney-client related personal and telephonic conferences with Mrs. St. Louis, Attorneys Deborah Boyett, Paul Chambers, Stefanie Krause, and Leigh Burnside, preparing and assisting in the accountings submitted, attendance at the hearing on that accounting and the objections thereto, evaluating and dealing with issues surrounding a failure to pay estimated taxes for the Conservatee, time spent on a conservatorship challenge, analyzing and evaluating the accounting prepared by Wells Fargo regarding the Bingham Administrative Trust, which appeared to subsume the Survivor's Trust, the Marital Exempt and Non-Exempt Trusts and the Exemption Trust.	
<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		Petitioner's itemization includes 156.90 attorney hours @ \$300/hr and 27.30 paralegal hours @ \$100-120/hr.	
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice		Costs include filing fees, certified letters, telephonic appearances, and photocopies.	
		Petitioner states all cash assets of the Conservatee, \$110,708.97, held by Mrs. St. Louis as conservator were transferred to Randy Grace as conservator on 1/2/15.	
			Reviewed by: skc
			Reviewed on: 5/28/15
			Updates:
			Recommendation:
			File 3 - Bingham

4 Samuel Marcus Adams (Estate)

Case No. 12CEPR00326

Atty Flanigan, Philip M. (for Beverly T. Adams – Executor)

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

DOD: 11/18/2010	BEVERLY T. ADAMS , spouse, was appointed Executor with full IAEA authority without bond on 06/25/2012.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 12/09/2014: a verified written status report is to be filed by 05/29/2015.</p> <p>1. Need Inventory and Appraisal and First Account or Petition for Final Distribution 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 on 06/28/2012.	
	Inventory and Appraisal was due 10/26/2012.	
Cont. from 072613, 110813, 112414, 120914	Former Declaration of Danielle R. Guerrero and Status Report filed 11/19/2014 states Beverly T. Adams needed to be appointed as Personal Representative of her late husband's estate in order to file a wrongful death lawsuit on his behalf stemming from the airplane crash in Florida on 11/17/2010. The lawsuit was filed in Florida Southern District Court on 05/14/2013, Case No. 2:13-cv-14206. The original trial date for that matter was 08/15/2014. The trial was continued to 11/17/2014, then again to 01/12/2015, and is now scheduled for a two week trial beginning 05/18/2015. Mediation was scheduled for 11/07/2014 but was later postponed to allow a motion to be heard prior to mediation. The next mediation date is unscheduled at this time but will be rescheduled for early 2015, as it must be completed by April 2015, prior to the trial. If the matter is not settled at mediation, then the two week trial is set to begin May 18, 2015. An Inventory and Appraisal is not needed at this time as there is currently no real or personal property to be appraised. In the event that the wrongful death matter is resolved in favor of the decedent, the Personal Representative will file an Inventory and Appraisal at that time, as the decedent had no other property subject to probate. It is respectfully requests that this probate matter be continued six months pending the anticipated resolution of the wrongful death litigation.	
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: LV
		Reviewed on: 05/28/2015
		Updates:
		Recommendation:
		File 4 – Adams

5 Ronald Edward Hall (Estate)

Case No. 12CEPR00794

Attorney: Michael D. Dowling (for Petitioners/Administrators Jeffrey David Hall & Stephen Gregory Hall)

Waiver of First and Final Account and Report of Co-Administrators and Petition for Settlement Thereof; for Allowance of Attorney's Fees for Ordinary and Extraordinary Services and Reimbursement of Advanced Costs; and for Final Distribution.

DOD: 6/6/12		<p>JEFFREY DAVID HALL and STEPHEN GREGORY HALL, Co-Administrators, are petitioners.</p> <p>Accounting is waived.</p> <p>I & A - \$996,354.25 POH - \$997,461.38</p> <p>Administrators - waive</p> <p>Attorney (statutory) - \$22,327.08</p> <p>Attorney X/O - \$5,077.15 (for defense in a lawsuit against the estate. 17.30 attorney hours @ \$210-420 per hour and 2.40 paralegal hours @ \$145-\$150 per hour)</p> <p>Costs - \$2,014.38 (filing fees, certified copies, probate referee, publication)</p> <p>Closing reserve - \$4,000.00</p> <p>Distribution, pursuant to intestate succession, is to:</p> <p>Jeffrey David Hall - ½ of the property on hand.</p> <p>Stephen Gregory Hall - ½ of the property on hand.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cont. from			
<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 checked="" type="checkbox"/>	Letters 10/12/12		
<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		
		<p>Reviewed by: KT</p> <p>Reviewed on: 5/27/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 5 - Hall</p>	

Status RE: Informal Accounting of Closing Reserve

DOD: 08/19/13	PUBLIC ADMINISTRATOR , Administrator, filed his First and Final Account and Report of Administrator, etc. on 10/15/14. The Petition requested a closing reserve of \$10,000.00.	NEEDS/PROBLEMS/COMMENTS:
Cont. from		
Aff.Sub.Wit.	Minute Order dated 12/02/14 from the hearing on the First and Final Account set this matter for a status hearing regarding an Informal Accounting of Closing Reserve.	1. Need informal accounting of \$10,000.00 closing reserve and/or current status report.
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 05/27/15
		Updates:
		Recommendation:
		File 7 - McPike

DOD: 5-17-13	LOUISE BAKER , was appointed Executor with full IAEA authority without bond on 01/27/2014.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need petition to close insolvent estate. (Petition must be filed and set for noticed hearing, including notice to heirs and creditors per Probate Code §11000.)</p> <p>Note: The original petition estimated the estate to contain personal property valued at \$500,000.00.</p> <p>Note: Louise Baker is the sole heir pursuant to the decedent's will dated 12-21-84; however, Letters issued on 1-28-14 and two creditor's claims have been filed totaling \$1,983.54. The estate must be properly closed by noticed petition. See Probate Code §§ 10950 et seq., 11000, 12200.</p>
	Letters issued on 01/28/2014.	
Cont. from	Minute Order of 01/06/2014 set as status hearing for the filing of the Inventory and Appraisal.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>Report of Status and Request for Extension of Time to Close the Estate filed 4/17/15 states the decedent, knowing she was going to die, gave away her personal property and spent her last known money on her treatment. The executor had talked with the decedent a few weeks prior to her death and had been informed of a life insurance policy with a value of \$500,000.00; however, the policy amounts never materialized in the estate. The Executor is only aware of one creditor's claim and is checking the file to ascertain the second one. Petitioner's attorney advanced \$785.00 on behalf of the estate for filing fees as set forth on Exhibit B.</p> <p>Petitioner prays that the Report of Status be approved; that the time for administering the estate be closed; and that Petitioner be allowed to close out the estate.</p> <p>Minute Order from last hearing in this matter on 04/20/15 states: There is no Inventory & Appraisal to file. No appearance is necessary on 06/02/15 if the petition is filed at least two court day prior.</p>	
		Reviewed by: JF
		Reviewed on: 05/28/15
		Updates:
		Recommendation:
		File 8 - Ello

	<p>CYNTHIA C. THOMAS and PAMELA J. THOMAS, daughters, were appointed Co-Conservators of the Person and Estate with bond of \$\$65,709.60 on 1-29-14. Bond was filed and Letters issued on 2-6-14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
<p>Cont from 040315, 050515</p>	<p>At the hearing on 1-29-14, the Court set this status hearing for the filing of the first account.</p>	<p>Note: This matter was continued to meet up with the motion of Attorney Kenton J. Klassen of Dowling Aaron Incorporated to be Relieved as Counsel. See Page B.</p>
<p>Aff.Sub.Wit.</p>		
<p>Verified</p>		
<p>Inventory</p>		
<p>PTC</p>	<p>Status Declaration of Jared C. Marshall filed 4-2-15 states his firm prepared the first account current and report of Co-Conservators, which was executed by the Co-Conservators on or around 3-3-15. Unfortunately, due to unforeseen circumstances, his firm has requested to withdraw as counsel of record for the Co-Conservators. These same circumstances, and his duties as officer of the court, preclude him from filing the existing first account current and report of the Co-Conservators on their behalf.</p>	<p>1. Need first account pursuant to Probate Code §2620 or written status report pursuant to local rules.</p>
<p>Not.Cred.</p>		
<p>Notice of Hrg</p>		
<p>Aff.Mail</p>		
<p>Aff.Pub.</p>		
<p>Sp.Ntc.</p>		
<p>Pers.Serv.</p>		
<p>Conf. Screen</p>		
<p>Letters</p>		
<p>Duties/Supp</p>	<p>A substitution of attorney was mailed to the Co-Conservators on 3-24-15, but has not yet been returned. Absent the return of the signed form or a material change in the existing circumstances, the firm intends to file a petition to withdraw as counsel of record and will file for attorney's fees separately.</p>	
<p>Objections</p>		
<p>Video Receipt</p>		
<p>CI Report</p>		
<p>9202</p>		
<p>Order</p>	<p>Mr. Marshall respectfully requests a continuance of 30 days to finalize withdrawal as counsel and to allow the Co-Conservators time to retain other counsel or otherwise finalize their first account in pro per.</p>	
<p>Aff. Posting</p>		<p>Reviewed by: skc</p>
<p>Status Rpt</p>		<p>Reviewed on: 5/28/15</p>
<p>UCCJEA</p>		<p>Updates:</p>
<p>Citation</p>		<p>Recommendation:</p>
<p>FTB Notice</p>		<p>File 9A - Coyle</p>

Motion to be Relieved as Counsel

		<p>KENTON J. KLASSEN of Dowling Aaron Incorporated, attorneys for Co-Conservators, is Petitioner.</p> <p>Petitioner states a substitution of attorney was sent to Co-Conservators Cynthia C. Thomas and Pamela J. Thomas on 3/24/15 with a cover letter explaining that the firm was terminating its representation and requesting that the client obtain independent counsel and sign and return the substitution form. The client did respond by phone call, but failed to sign and return the form.</p> <p>It is necessary to withdraw for the reasons contained in the 3/24/15 letter to the client (not provided). There has been a breakdown in the attorney-client relationship. The client's failure to cooperate with the firm has made it unreasonably difficult to carry out its employment effectively.</p> <p>The firm has made the client file available to the client and has advised the client to find new legal counsel and prepare and file an appropriate accounting. To the firm's knowledge, the Conservatee is being well taken care of and is not prejudiced by this proceeding. The payment of the firm's fees will be requested and addressed in a separate subsequent petition following the client's filing of the first account and report.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
	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			
			<p>Reviewed by: skc</p> <p>Reviewed on: 5/28/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 9B - Coyle</p>	

Petitioner Hoyos, Lisa Marie (pro per – maternal aunt)
 Petitioner Hoyos, Jeremy Joseph (pro per – maternal uncle)

Petition for Appointment of Temporary Guardian of the Person

Age: 1 yr	<u>GENERAL HEARING: 07/20/15</u>	NEEDS/PROBLEMS/COMMENTS:
	JEREMY HOYOS and LISA HOYOS , maternal uncle and aunt, are Petitioners.	<p>Note: Petitioners previously petitioned for guardianship in 2014, but filed a request for dismissal on 06/10/14.</p>
	Father: FRANCISCO BARAJAS – <i>Consent & Waiver of Notice filed 05/26/15; also personally served on 05/23/15</i>	
Cont. from	Mother: RHIANNON ROSS – <i>Consent & Waiver of Notice filed 05/26/15; also personally served on 05/23/15</i>	
<input type="checkbox"/> Aff.Sub.Wit.	Paternal grandparents: UNKNOWN	
<input checked="" type="checkbox"/> Verified	Maternal grandfather: DARRELL ROSS Maternal grandmother: CONNIE HOYOS	
<input type="checkbox"/> Inventory	Petitioners state [see Petition for details].	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv. w/		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<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: JF
		Reviewed on: 05/28/15
		Updates:
		Recommendation:
		File 10 - Ross

First and Final Account and Report of Executor and Petition for Final Settlement and Distribution, Accounting Waived

DOD: 02/19/14		CHARLES L. ROBINSON, Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Accounting is waived.	<p>1. Need Order. Note: Pursuant to Local Rule 7.6.1A - All orders or decrees in probate matters must be complete in themselves. Orders shall set forth all matters ruled on by the court, the relief granted, and the names of persons, descriptions of property and/or amounts of money affected with the same particularity required of judgments in general civil matters. Monetary distributions must be stated in dollars, and not as a percentage of the estate.</p>
Cont. from		I & A - \$180,229.33	
	Aff.Sub.Wit.	POH - \$180,229.33	
✓	Verified	Executor - waived	
✓	Inventory	Attorney - \$6,406.88(statutory)	
✓	PTC	Distribution, pursuant to Decedent's Lost Will, is to:	
✓	Not.Cred.	Charles L. Robinson: estate remaining after payment of statutory fees	
✓	Notice of Hrg		
✓	Aff.Mail	w/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters	12/10/14	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	9202		
	Order	x	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
✓	FTB Notice		
			Reviewed by: JF
			Reviewed on: 05/28/15
			Updates:
			Recommendation:
			File 11 - Robinson

Pro Per Petitioner: McKenna E. Frasch, mother
 Guardian: Fries, Laurie, paternal grandmother

Petition for Visitation

		McKENNA E. FRASCH , mother, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of 15 days' service prior to hearing of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Visitation</i> or <i>Consent and Waiver of Notice</i>, or <i>Declaration of Due Diligence</i>, for:</p> <ul style="list-style-type: none"> • NICHOLAS FRIES, father; <i>Proof of Service by Mail</i> of the <i>Notice of Hearing</i> filed 4/29/2015 indicates the address for Nicholas Fries, father, is unknown, such that no proof of service to him is indicated. • Richard Frasch, maternal grandfather. <p>2. <i>Proof of Service by Mail</i> of the <i>Notice of Hearing</i> filed 4/29/2015 does not indicate a copy of the <i>Petition for Visitation</i> was mailed with the notice.</p>
		LAURIE FRIES , paternal grandmother, was appointed Guardian on 9/18/2014.	
		Guardian was served notice by mail 4/27/2015.	
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	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		~Please see Petition for details~	
		Declaration filed by Petitioner on 4/27/2015 includes several attachments.	
		Reviewed by: LEG	
		Reviewed on: 5/28/15	
		Updates:	
		Recommendation:	
		File 12 - Fries	

Attorney: Rodriguez, Frankie D., for Petitioner Primavera Damme, Administrator

Probate Status Hearing Re: Proof of Bond

DOD: 8/1/2013	<p>PRIMAVERA DAMME, daughter, was appointed Executor with Full IAEA with bond of \$175,000.00 on 4/14/2015.</p> <p>Minute Order dated 4/14/2015 from the hearing on the petition for letters of administration set the matter for a Status Hearing on 6/2/2015 for filing of the proof of bond.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Letters of Administration filed on 4/24/2015 were revoked on 5/28/2015 due to the Petitioner not having filed proof of bond.</p> <p>1. Need proof of bond to be filed with the Court in the sum of \$175,000.00 pursuant to Probate Code § 8480.</p>	
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
Bond			X
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: LEG	
		Reviewed on: 5/28/15	
		Updates:	
		Recommendation:	
		File 13 - Valencia	

Petition for Probate of Will and for Letters of Administration Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 7-1-06	JONATHAN VAUGHAN , Son, is Petitioner and requests appointment as Administrator with Limited IAEA without bond.	NEEDS/PROBLEMS/COMMENTS:
		Continued from 3-23-15, 5-4-15
		The following issues remain noted:
Cont from 032315, 050415	Limited IAEA – ok	1. The Fresno Bee publication used outdated language regarding notice to creditors. See Probate Code §8100 and Form DE-121, Notice of Petition to Administer Estate, which was updated 1/1/13. The Court may require amended publication.
<input type="checkbox"/> Aff.Sub.Wit.	Decedent died intestate	2. The Court may require waivers of bond (new Judicial Council Form DE-142) from the remaining heirs:
<input checked="" type="checkbox"/> Verified	Residence: Miramonte, CA Publication: Fresno Bee	- Darrell Vaughan (son)
<input type="checkbox"/> Inventory		- Shanna Greene (granddaughter)
<input type="checkbox"/> PTC		- Nathan Greene (grandson)
<input type="checkbox"/> Not.Cred.	Estimated value of estate: Personal property: Unknown, if any Real property: \$78,000.00	- Christopher Vaughan (<u>relationship not stated – need clarification</u>)
<input checked="" type="checkbox"/> Notice of Hrg	Probate Referee: Rick Smith	Note: If granted, the Court will set status hearings as follows:
<input checked="" type="checkbox"/> Aff.Mail		• Monday, July 20, 2015 for the filing of bond, if required
<input checked="" type="checkbox"/> Aff.Pub.		• Monday, Nov. 2, 2015 for the filing of the inventory and appraisal
<input type="checkbox"/> Sp.Ntc.	Petitioner requests bond be waived because the estate consists solely of real property upon which Petitioner currently resides. Waivers have been obtained from only two of the heirs; however, Petitioner requests that if the property is sold, any proceeds be placed into a blocked account.	• Monday, Sept. 12, 2016 for the filing of the first account or petition for final distribution.
<input type="checkbox"/> Pers.Serv.		If the proper items are on file pursuant to local rules, the status hearings may be taken off calendar.
<input type="checkbox"/> Conf. Screen		Reviewed by: skc
<input checked="" type="checkbox"/> Letters		Reviewed on: 5-27-15
<input checked="" type="checkbox"/> Duties/Supp		Updates:
<input type="checkbox"/> Objections		Recommendation:
<input type="checkbox"/> Video Receipt		File 15 - Vaughan
<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		

Pro Per Petitioner: Janet Garcia-Cruz, sister

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

		TEMPORARY GRANTED ON COURT'S OWN MOTION EXPIRES 6/2/2015	NEEDS/PROBLEMS/COMMENTS:
		JANET GARCIA-CRUZ, sister, is Petitioner.	
Cont. from 042115		~Please see Petition for details~	<p>Continued from 4/21/2015. Minute Order states continued due to the service defects as to the father and the paternal grandparents. The Court orders temporary letters are to issue forthwith.</p> <p>1. Need proof of personal service of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian, or Consent to Appointment of Guardian and Waiver of Notice, or a Declaration of Due Diligence</i>, for:</p> <ul style="list-style-type: none"> Ignacio Gonzalez, father, if Court does not find due diligence based on Declaration filed 5/27/2015. <p>2. Need proof of service by mail of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian, or Consent to Appointment of Guardian and Waiver of Notice, or a Declaration of Due Diligence</i>, for:</p> <ul style="list-style-type: none"> paternal grandparents, if Court does not excuse notice as Petitioner requests.
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 5/28/15
			Updates:
			Recommendation:
			File 16 – Gonzalez-Cruz

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

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: 1. Need diligence re unknown paternal grandparents or notice pursuant to Probate Code §511.	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			W
	Aff.Mail			
	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: skc	
			Reviewed on: 5/27/15	
			Updates:	
			Recommendation:	
			File 18A - Cruz	

28 Morgan Elizabeth Pasley (CONS/PE) Case No. 12CEPR00938

Attorney Erlach, Mara M. (for Debra Pasley – Conservator – Petitioner)

**Second Amended Account Current and Report of Conservator; Petition of Conservator
Petition for its Settlement, for Allowance of Attorneys Compensation and for its Termination**

		<p>DEBRA PASLEY, Mother and Conservator of the Person and Estate with bond of \$15,000.00, is Petitioner. <i>(Not verified.)</i></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: This petition was originally set for 4/23/15 and continued to 6/2/15 at the attorney's request.</p> <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p>
Cont. from 042315		<p>Account period: 3/28/13 – 10/17/14</p> <p>Accounting: <u>Not provided</u></p> <p>Beginning POH: \$13,438.31</p> <p>Ending POH: \$70,195.61</p> <p>(\$1,715.61 plus a 1/5 interest in real property in Virginia valued at \$68,480.00)</p>	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified	x	
<input checked="" 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.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters	3/28/13	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	x	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Petitioner states: Inventory and Appraisal was filed 6/5/13 showing the value of the estate to be \$13,438.31. Summary of account and supporting schedules are provided at Exhibit B. <i>(See #1.)</i></p> <p>As reflected in prior pleadings, the Conservator and Conservatee moved out of state. The Conservator was appointed Guardian of the Conservatee in Oklahoma by Court order and Letters issued on 8/13/14.</p> <p>Petitioner does not request compensation for her services.</p> <p>Petitioner requests attorney's compensation as set forth in Exhibit "C." <i>(See #3.)</i></p>	
		<p>Petitioner prays:</p> <ol style="list-style-type: none"> 1. That this account and report be approved and settled; 2. That the acts of the Conservator shown in the account and report be approved; 3. That, upon settlement of this account, the Conservator be directed to pay her attorneys, McCormick Barstow, LLP, compensation for services rendered and, as yet, unpaid; 4. That the Conservatorship in California be terminated; and 5. That the Court grant such other and further relief as it deems just and proper. 	
		<p>Reviewed by: skc</p> <p>Reviewed on: 5/28/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 28 – Pasley</p>	

28 Morgan Elizabeth Pasley (CONS/PE) Case No. 12CEPR00938

1. This petition does not provide any accounting in the form required by Probate Code §§ 2620, 1060, or any mandatory schedules on the required Judicial Council forms.

Need amended petition with accounting, schedules, including required mandatory form for summary. Although Petitioner has been appointed Guardian in Oklahoma, this Court retains jurisdiction for settling accounts pursuant to Probate Code §2630.

The only schedule provided at Exhibit B is a statement of property on hand, labeled as "receipts," but which does not show any account summary, receipts, disbursements, etc., and further indicates that the conservatorship estate cash has been reduced by \$11,722.70 without explanation.

Note: The Conservatee's interest in the Virginia real property is not an asset of this conservatorship estate, but should be referenced in its own schedule pursuant to §1063(h).

2. This petition is not verified by the Conservator as required by Probate Code §§ 1021, 1023.
(Note: §1023 provides that an attorney may sign or verify on a client's behalf if he or she is absent from the county unless the person is a fiduciary appointing in the proceeding.)
3. Petitioner requests attorney's compensation pursuant to Exhibit C, but no Exhibit C is attached.
4. Need Notice of Hearing.
5. Need proof of service of Notice of Hearing at least 15 days prior to the hearing pursuant to Probate Code §1460(b)(6) on:
 - Morgan Elizabeth Pasley (Conservatee)
 - Debra Pasley (Conservator/Fiduciary, since the petition is not verified by her)
 - David Hal Jones (Father)
6. *The Court may also require notice to the surety of any continued or future hearings.*