

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>Sp.Ntc.</p>		
<p>Pers.Serv.</p>		
<p>Conf. Screen</p>		
<p>Letters</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>Reviewed by: LEG</p>
<p>✓ Status Rpt</p>		<p>Reviewed on: 5/28/15</p>
<p>UCCJEA</p>		<p>Updates: 5/28/2015</p>
<p>Citation</p>		<p>Recommendation:</p>
<p>FTB Notice</p>		<p>File 1 - Harris</p>

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>	

Petition for Discharge Without Administration - No Property

DOD: 3/22/12		<p>MARGARET ANDERSEN, Executor, is petitioner.</p> <p>Petitioner states a creditor's claim was filed by Barbara Cardoza on 2/11/13 for purported damages allegedly caused by Decedent in an amount to be determined at trial. Petitioner rejected the creditor's claim on or about 3/7/13.</p> <p>The civil action on the rejected claim was filed on or about 3/6/13, in the case titled Cardoza v. Andersen, et al, Fresno County Superior Court case no. 13CECG00711. Through the action, Barbara Cardoza sought damages related to the death of Cardoza's husband, Frank Cardoza, on 3/22/12, for various causes of action including intentional tort and negligence.</p> <p>Pursuant to the Order of this Court dated 3/18/13, Petitioner retained Chielpegian Law Offices as special litigation counsel to represent Petitioner in connection with defense of the action to preserve and protect the estate's rights and to litigate the various issues related thereto.</p> <p>In or about January 2015, Petitioner settled the civil action with Cardoza and the case has now been dismissed.</p> <p>Petitioner alleges the estate has no assets subject to administration.</p> <p>Wherefore, Petitioner prays for an Order that:</p> <ol style="list-style-type: none"> 1. The Court grant the Petition for Discharge without Administration – No Property; 2. The Court terminate this administration, and Margaret Andersen, Executor of the Estate, be discharged. 	<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 checked="" type="checkbox"/>	Sp.Ntc.			W/
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			2/5/13
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	9202			
<input type="checkbox"/>	Order			
<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: KT		
		Reviewed on: 5/29/15		
		Updates:		
		Recommendation:		
		File 6 - Anderson		

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: <p style="text-align: center;"><u>OFF CALENDAR</u> Informal Accounting filed 05/28/15</p>
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.	
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: 05/28/15
		Recommendation:
		File 7 - McPike

Motion to be Relieved as Counsel

		<p>KENTON J. KLASSEN of Dowling Aaron Incorporated, attorneys for Co-Conservators, is Petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Substitution Of Attorney filed 5/29/15.</p> <p>Note: Cynthia C. Thomas and Pamela J. Thomas, Co-Conservators, have now filed their First Account Current in pro per, which is set for hearing on 7/20/15.</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>	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	<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>	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	<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>	
<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		
			<p>Reviewed by: skc</p> <p>Reviewed on: 5/28/15</p> <p>Updates: 5/29/15</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	GENERAL HEARING: 07/20/15		NEEDS/PROBLEMS/COMMENTS:
	<p>JEREMY HOYOS and LISA HOYOS, maternal uncle and aunt, are Petitioners.</p>		<p>Note: Petitioners previously petitioned for guardianship in 2014, but filed a request for dismissal on 06/10/14.</p>
	<p>Father: FRANCISCO BARAJAS – Consent & Waiver of Notice filed 05/26/15; also personally served on 05/23/15</p>		
Cont. from	<p>Mother: RHIANNON ROSS – Consent & Waiver of Notice filed 05/26/15; also personally served on 05/23/15</p>		
<input type="checkbox"/> Aff.Sub.Wit.	<p>Paternal grandparents: UNKNOWN</p>		
<input checked="" type="checkbox"/> Verified	<p>Maternal grandfather: DARRELL ROSS Maternal grandmother: CONNIE HOYOS</p>		
<input type="checkbox"/> Inventory	<p>Petitioners state [see Petition for details].</p>		
<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.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. There appears to be an addition error in the Order. The Order lists the value of the property on hand as \$172,299.72 (which is the total of item 2 only, does not include item 1); Examiner calculates items 1 and 2 to total \$180,229.33 and thus after payment of statutory attorney's fees, there remains \$173,822.45 remaining to be distributed to the beneficiary. Need revised Order.</p>
	Accounting is waived.	
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: \$173,822.45 (as calculated by the Examiner, see note 1)	
✓ 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		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
✓ FTB Notice		
		Reviewed on: 05/28/15
		Updates: 05/29/15
		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.	
		<i>Guardian was served notice by mail 4/27/2015.</i>	
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	

14 Etelberto Araiza (Estate) Case No. 14CEPR00860

Attorney Istanbulian, Flora (for Maria D. Camarillo – Administrator)

First and Final Report of Administrator on Waiver of Account and Petition for Final Distribution; for Allowance of Compensation to Attorney

DOD: 05/08/2014		MARIA D. CAMRILLO , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Accounting is waived	
Cont. from		I&A - \$144,517.60	
	Aff.Sub.Wit.	POH - \$146,317.93	
		(\$62,057.51 is cash)	
✓	Verified	Executor – Waives	
✓	Inventory	Attorney - \$2000.00	
	PTC	(less than statutory)	
✓	Not.Cred.	Closing - \$1,000.00	
✓	Notice of Hrg		
✓	Aff.Mail		
	Aff.Pub.	Distribution, pursuant to intestate succession, is to:	
	Sp.Ntc.	Juliana Araiza - \$29,528.76; ½ interest in real and personal property.	
	Pers.Serv.	Jose I. Araiza - \$29,528.76; ½ interest in real and personal property.	
	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: 05/29/2015
			Updates:
			Recommendation: Submitted
			File 14 - Araiza

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 w		• 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

DOD: 01/19/2015	MIKE PISTORICH , nephew, is petitioner and is requesting to be appointed as Administrator with will annexed without bond.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Petition does not provide enough information with regard to whether the lost Will was revoked or destroyed by the testator prior to his death. The Court may require more information. Notice must indicate Petition of a Lost Will pursuant to California Rule of Court 7.50. Need Order. Note: Order must comply with Probate Code §8223. <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> Tuesday, 11/03/2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> Tuesday, 08/16/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
Cont. from	Full IAEA – o.k.	
<input checked="" type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Will dated: 08/07/1984	
Inventory	Residence: Fresno	
PTC	Publication: The Business Journal	
Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Estimated value of the Estate:	
<input checked="" type="checkbox"/> Aff.Mail w/	Personal property - \$630,450.53	
<input checked="" type="checkbox"/> Aff.Pub.	Real property - \$344,238.22	
Sp.Ntc.	Total - \$974,688.75	
Pers.Serv.	Probate Referee: Rick Smith	
Conf. Screen	Petition states: Decedent executed a valid Will dated 08/07/1984, but that original Will has been lost. At the time of his death, Decedent was not competent. Decedent had been diagnosed with dementia.	
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order x		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
Reviewed by: LV		
Reviewed on: 05/27/2015		
Updates:		
Recommendation:		
File 17 – Kurtovich		

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	

Age: 4		<p>TEMPORARY EXPIRES 06/02/2015</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
		<p>JULIE PHASAKDA, paternal aunt, is Petitioner.</p>	<p>1. Need Notice of Hearing.</p>
Cont. from		<p>Please see petition for details</p>	<p>2. Need proof of personal 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:</p> <ul style="list-style-type: none"> Saysong Kham Phasakda (Father) Anason Keonhothy (Mother) – Unless the court dispenses with notice. <p>Note: Declaration of Due Diligence filed 03/30/2015 states after numerous attempts via Facebook, the result was unsuccessful, the last number was disconnected. Mother contacted the petitioner via social media stating she was homeless. Last message received from the mother was 02/15/2015.</p>
Aff.Sub.Wit.			
✓ Verified		<p>3. 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:</p> <ul style="list-style-type: none"> Sy Phasakda (Paternal Grandmother) Maternal Grandparents (Not Listed) 	<p>5. UCCJEA is incomplete. Need minor's residence information for the past 5 years.</p>
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			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
		Reviewed by: LV	
		Reviewed on: 05/28/2015	
		Updates:	
		Recommendation:	
		File 19 – Phasakda	

Age: 1	<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS:
	JULIA L. POLLET , maternal grandmother, is Petitioner.	1. Need <i>Notice of Hearing</i> .
	Father: ROBERT PHIPPS	2. 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> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for:
Cont. from	Mother: RICKI CARLSON	a. Robert Phipps (father) – <i>personal service required</i>
Aff.Sub.Wit.	Paternal grandparents: NOT LISTED	b. Ricki Carlson (mother) – <i>personal service required</i>
✓ Verified	Maternal grandfather: RICHARD CARLSON	c. Paternal grandparents – <i>service by mail sufficient</i>
Inventory	Petitioner states [see Petition for details].	d. Richard Carlson (maternal grandfather) – <i>service by mail sufficient</i>
PTC	Court Investigator Jennifer Daniel filed a report on 05/19/15.	
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: 05/28/15
		Updates:
		Recommendation:
		File 20- Phipps

21 In Re: The Kermit F. Fish and Rosalie J. Fish Revocable Living Trust Agreement dated 10/25/1993; Trust A-the Survivor's Trust; Trust B-the Family Trust Case No. 15CEPR00402

Attorney Nahigian, Eliot S. (for Petitioners Phillip F. Fish and Andrea K. Fritzen)

Petition to Remove a Co-Trustee and Appoint Successor Trustee; for Instruction to Trustee to Reimburse Income Tax Payments, Remedy a Breach of Trust, Pay Accountant, Withdraw Certificates of Deposit, and Distribute Trust Estate

Kermit F. Fish DOD: 8/18/03	<p>PHILLIP F. FISH and ANDREA K. FRITZEN are Petitioners.</p> <p>Petitioners state: Kermit F. Fish and Rosalie J. Fish established the Kermit F. Fish and Rosalie Revocable Living Trust on 10/25/93, amended 12/4/95. Upon the death of Kermit Fish on 8/18/03, the trust was divided into two sub-trusts: a revocable Survivor's Trust (the Rose Fish Trust), and the irrevocable Family Trust. Rose Fish amended the Rose Fish Trust on 6/21/07.</p> <p>The Co-Trustees of the Family Trust are PHILLIP F. FISH and JOSEPH F. FISH.</p> <p>The Co-Trustees of the Rose Fish Trust are PHILLIP F. FISH, ANDREA K. FRITZEN, and JOSEPH F. FISH.</p> <p>The Family Trust assets were distributed in equal shares to the beneficiaries on or about 1/22/15.</p> <p>Rose Fish had a general power of appointment over the Rose Fish Trust, and if not exercised, then the unappointed principal was to be added to the Family Trust upon her death.</p> <p>The Rose Fish Trust assets were not distributed to the Family Trust.</p> <p>As of 12/31/14, the assets of the Rose Fish Trust included various accounts totaling \$418,843.18, plus the contents of a Safe Deposit Box and various coins found in the Rose Fish Piano.</p> <p>Petitioners state they have requested that the Rose Fish Trust be distributed. Co-Trustee JOSEPH F. FISH has refused to make distribution. Under Probate Code §15620, unanimous action is required by the co-trustees.</p> <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Petitioners state Fresno County is the proper venue because Jim G. Sabbatini, CPA, of Selma, CA, has maintained trust accounting records and performed accounting and tax services for the trust from at least 2003 to the present.</p> <p>However, none of the three Co-Trustees reside in Fresno County. Phillip F. Fish resides in Tuolumne County, CA, Andrea K. Fritzen resides in Santa Barbara County, CA, and Joseph F. Fish resides in Carson City, NV.</p> <p>The Court may require clarification re Fresno as proper venue with reference to Probate Code §§ 17002, 17005.</p>
Rosalie J. Fish DOD: 8/2/14		
Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
Inventory		
PTC		
Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail w		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
Reviewed by: skc		
Reviewed on: 5/28/15		
Updates:		
Recommendation:		
File 21 - Fish		

**21 In Re: The Kermit F. Fish and Rosalie J. Fish Revocable Living Trust
Agreement dated 10/25/1993; Trust A-the Survivor's Trust; Trust B-the Family Trust
Case No. 15CEPR00402**

Page 2

Petitioners state: Except for accounting fees owed to CPA Jim G. Sabbatini and income taxes, all creditors of Rose Fish, the Rose Fish Trust, and the Family Trust have been paid, and the trusts are in a condition for distribution. Mr. Sabbatini provided an estimate of the income taxes due for Rose Fish's 2014 income tax returns and on 3/13/15, a letter and email were sent to Jon Adams, attorney for Joseph Fish, informing him of the Federal and California combined liability of \$13,000.00. Mr. Sabbatini timely prepared vouchers for automatic extensions of time to file. Petitioners had a letter prepared to Wells Fargo Advisors from all three co-trustees with instructions to prepare checks for the tax payments. Joseph Fish did not sign the letter of instruction and Wells Fargo Advisors did not issue the checks for the tax payments.

On 4/6/15, Mr. Sabbatini computed the extension payments and Petitioners advanced two-thirds of the extension payments and now each of them seeks reimbursement from the Rose Fish Trust for the Federal income tax payment of \$3,169.00 and the California income tax payment of \$787.00. Advancement by the co-trustees and reimbursement is allowed under the terms of the trust.

Breach of Trust: Petitioners state the failure of Joseph F. Fish to agree to distribution and to sign the letter of instruction and make the payments of income taxes constitute a breach of trust including breach of duty to administer the trust according to its terms and the duty of loyalty. All three remainder beneficiaries have been damaged by the actions of Joseph F. Fish including legal fees of \$5,063.50 for filing this petition and \$3,620.00 for legal work in connection with the payment of income taxes. See Exhibits F and G. Petitioners request the court remedy this breach by paying \$8,683.50 from the trust estate to Coleman and Horowitz, LLP.

Further, Petitioners request the court remedy the breach of trust by removing Joseph F. Fish as a co-trustee of the Rose Fish Trust and as a co-trustee of the Family Trust.

Under the terms of the Rose Fish Trust pursuant to the Second Amendment, upon the resignation, incapacity or death of any of the co-trustees, the remaining individuals shall serve as trustees. Petitioners requests that they be appointed as the Co-Trustees of the Rose Fish Trust.

Under the terms of the Family Trust pursuant to the First Amendment, upon the resignation, incapacity, or death of a co-trustee, then the remaining individual shall serve as sole trustee. Petitioners request that Phillip F. Fish be appointed sole trustee of the Family Trust.

Accounting Fees: Mr. Sabbatini has submitted invoices totaling \$3,295.00 that have not yet been paid, and has also provided accounting services in connection with preparation of an informal accounting totaling \$600.00. An estimated final accounting bill is \$1,450.00. Mr. Sabbatini seeks a total payment of \$5,345.00.

SEE ADDITIONAL PAGES

Dept. 303, 9:00 a.m. Tuesday, June 2, 2015

**21 In Re: The Kermit F. Fish and Rosalie J. Fish Revocable Living Trust
Agreement dated 10/25/1993; Trust A-the Survivor's Trust; Trust B-the Family Trust
Case No. 15CEPR00402**

Page 3

Petitioners pray for the following:

1. An order removing Joseph F. Fish as a co-trustee of the Rose Fish Trust;
2. An order appointing Phillip F. Fish and Andrea K. Fritzen as co-trustees of the Rose Fish Trust;
3. An order removing Joseph F. Fish as a co-trustee of the Family Trust;
4. An order appointing Phillip F. Fish as sole trustees of the Family Trust;
5. An order instructing Phillip F. Fish and Andrea K. Fritzen as co-trustees of the Rose Fish Trust to:
 - a. Reimburse Petitioners \$3,169 each for the amounts advanced for extension payments on federal income taxes and \$787 each for California income taxes for Rose Fish for 2014;
 - b. Pay \$8,683.50 to Coleman & Horowitz, LLP to remedy a breach of trust in connection with failing to make distribution of the Rose Fish Trust and to remedy a breach of trust in connection with income tax returns and extensions;
 - c. Pay Jim Sabbatini \$5,345 for accounting services;
 - d. Completely withdraw the CDs of the Rose Fish Trust held at EECU;
 - e. Distribute the balance of the Rose Fish trust estate to Phillip F. Fish as trustee of the Family Trust;
6. An order instructing Phillip F. Fish as sole trustees of the Family Trust to:
 - a. Retain a reserve for closing expenses of \$9,000.02 and to distribute the balance of the reserve account equally to the beneficiaries without further court order;
 - b. Distribute the trust estate of the Family Trust, including additions from the Rose Fish Trust, to the persons entitled thereto;
7. For costs herein; and
8. For such other orders as the Court deems proper.

Dept. 303, 9:00 a.m. Tuesday, June 2, 2015

Attorney: Wheeler, Richard T., for Petitioners Dale A. Landrith, Terry P. Martin, Kim Maxfield, Danielle Amber Silva Worrell and Shaylee Burt

Petition to Determine Succession

DOD: 2/7/2015	DALE A. LANDRITH , daughter, TERRY P. MARTIN , son, KIM MAXFIELD , granddaughter, DANIELLE AMBER SILVA WORRELL , granddaughter, and SHAYLEE BURT , granddaughter, are Petitioners.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. <i>Petition</i> lists SHALYEE BURT as a Petitioner, and proposed order also includes this name as a distributee. However, Decedent's Will lists the person as SHAYLEE BURT. Need clarification of correct name spelling, and revised proposed order if the name should be spelled SHAYLEE BURT.</p> <p>2. Item 9(a)(2)(b) of <i>Petition</i> states Decedent's spouse is deceased. Item 14 of <i>Petition</i> does not include the name and date of death of the deceased spouse, and does not include the date of death of Decedent's deceased son, JOEL T. MAXFIELD, pursuant to Local Rule 7.1.1(D), which provides that if a beneficiary, heir, child, spouse or registered domestic partner in any action before the Probate Court is deceased, that person's date of death shall be included in the petition.</p> <p align="center">~Please see additional page~</p>
Cont. from		
Aff.Sub.Wit.		
✓ Verified	40 days since DOD.	
Inventory		
PTC		
Not.Cred.	No other proceedings.	
✓ Notice of Hrg		
✓ Aff.Mail	I & A - \$97,766.29	
Aff.Pub.		
Sp.Ntc.	Will dated 3/21/2014 devises	
Pers.Serv.		
Conf. Screen	Petitioner requests Court determination	
Letters	that Decedent's [unspecified %] interest	
Duties/Supp	in real property located at Ave.,	
Objections	Fresno, and 100% interest in personal	
Video Receipt	property, passes to the petitioner	
CI Report	pursuant to Decedent's will.	
9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LEG
		Reviewed on: 5/28/15
		Updates:
		Recommendation:
		File 22 - Maxfield

NEEDS/PROBLEMS/COMMENTS, continued:

3. Item 9a of the *Petition* is incomplete as to (3) or (4) re: registered domestic partner.
4. *Attachment 11* to the *Petition* does not state the amount of the Decedent's interest in the real (and personal property, if the subject of the instant *Petition*, which requires clarification from the Petitioner) as required per Item 11 of the *Petition*.
5. Item 14 of the *Petition* is incomplete, as it does not list the names, relationships to Decedent, ages and residence or mailing addresses so far as known to or reasonably ascertainable by Petitioner of all persons claiming an interest in the property, any spouse and children of Decedent, and all other heirs of Decedent. Need *Attachment 14* to the *Petition* containing all such information.
6. *Inventory and Appraisal* attached to the *Petition* filed 4/21/2015 includes personal property in the inventory at Attachments 1 and 2. However, *Petition* does not request the Court determine succession to personal property, and the proposed order does not include distribution of the personal property that is included on the *Inventory and Appraisal*. Need clarification and/or amended petition.

Attorney: Durost, Linda K., for Petitioners Ron Lavine and Alice Lavine, parents

Petition to Appoint Limited Conservator of the Person

		NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
		RON LAVINE and ALICE LAVINE, parents, are Petitioners and request appointment as Conservator of the Person with medical consent powers.	<p>Note: Order Appointing Counsel filed 5/22/2015 shows appointment of Attorney Curtis Rindlisbacher as legal counsel for the proposed Conservatee pursuant to Probate Code § 1471 providing for mandatory appointment for proposed Limited Conservatees.</p> <p>1. Petition requests the appointment of Petitioners as Limited Co-Conservators of the proposed Conservatee. Petitioners appear to seek a limited conservatorship based upon the fact that the proposed Conservatee is developmentally disabled; however, it appears a general conservatorship would more appropriately address the needs of this proposed Conservatee, who requires assistance with all activities of daily living, including feeding and hygiene, and requires constant supervision. Limited conservatorships are more appropriate in circumstances in which the proposed Conservatee has a greater degree of capacity for self-care and independent living. Probate Code § 2351 provides in pertinent part that the conservator, <u>but not a limited conservator</u>, has the care, custody, and control of, and has charge of the education of, the Conservatee. (Note: Amendment of the Petition is unnecessary; proposed order and letters could be marked to grant general conservatorship to Petitioners.</p> <p>~Please see additional page~</p>
Cont. from		Capacity Declaration filed 5/14/2015.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.	~Please see Petition for details~	
<input checked="" type="checkbox"/>	Notice of Hrg	Court Investigator's Report filed on 5/22/2015.	
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	X	
<input checked="" type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters	X	
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt	X	
<input checked="" 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	X	
<input type="checkbox"/>	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 5/29/15
			Updates:
			Recommendation:
			File 23 - Lavine

23 Additional Page, Jana Desirae Lavine (CONS/P) Case No. 15CEPR00426

NEEDS/PROBLEMS/COMMENTS:

2. Need *Citation for Conservatorship* pursuant to Probate Code § 1823, and proof of personal service of the *Citation* on the proposed Conservatee with a copy of the *Petition for Appointment of Probate Conservator* pursuant to Probate Code § 1824.
3. Item 5(f) of the *Petition* indicates the proposed Conservatee is developmentally disabled. Need proof of mailed service of the *Notice of Hearing* with a copy of the *Petition for Appointment of Probate Conservator*, showing service was mailed at least 30 days before the hearing to Central Valley Regional Center (CVRC) as defined in § 1827.5, pursuant to Probate Code § 1822(e).
4. Need *Conservatorship Video Viewing Certificate* pursuant to Local Rule 7.15.9(A).
5. Need proposed order.
6. Need proposed letters signed by Petitioners.

Petition for Letters of Administration; Authorization to Administer Under the Independent Administration of Estates Act

DOD: 04/11/15	SANDRA ANN SMITH , surviving spouse, is Petitioner, and requests appointment as Administrator with full IAEA and without bond.	NEEDS/PROBLEMS/COMMENTS: 1. Need Letters of Administration. <u>Note:</u> If granted, the Court will set status hearings as follows: <ul style="list-style-type: none"> Tuesday, Nov. 3, 2015 for the filing of the inventory and appraisal Tuesday, Sept. 13, 2016 for the filing of the first account or petition for final distribution. If the proper items are on file pursuant to local rules, the status hearings may be taken off calendar.
Cont. from	Full IAEA – OK	
<input type="checkbox"/> Aff.Sub.Wit.	All heirs waive bond	
<input checked="" type="checkbox"/> Verified	Decedent died intestate	
<input type="checkbox"/> Inventory	Residence: Fresno	
<input type="checkbox"/> PTC	Publication: The Business Journal	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w/	
<input checked="" type="checkbox"/> Aff.Pub.	Estimated Value of the Estate:	
<input type="checkbox"/> Sp.Ntc.	Real property - \$150,000.00	
<input type="checkbox"/> Pers.Serv.	Probate Referee: RICK SMITH	
<input 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 type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 05/29/15
		Updates:
		Recommendation:
		File 24 - Smith

Attorney Willoughby, Hugh W. (for Tiffany-Lin Directo – Mother – Petitioner)

Petition for Appointment of Guardian of Minor (Estate)

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> Page 26 is a petition re the estate of this minor's sibling Matthew.</p> <p><u>Note:</u> Pursuant to Local Rule 7.8.4.1, it is the policy of the court to block <u>all</u> funds in guardianship estates.</p> <ol style="list-style-type: none"> If \$49,000.00 is to remain unblocked, bond including cost of recovery pursuant to Cal. Rule of Court 7.207 should be \$55,000.00. Need Order to Deposit Money Into Blocked Account (MC-355). <p><u>Note:</u> If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> Tuesday, July 21, 2015 for filing of bond and/or receipt for blocked account Tuesday, Nov. 2, 2015 for filing of Inventory and Appraisal Tuesday, Sept. 6, 2016 for filing the first account <p>If the proper items are on file pursuant to Local Rule 7.5, the status hearings may come off calendar.</p>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	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: skc		
		Reviewed on: 5/29/15		
		Updates:		
		Recommendation:		
		File 25 - Directo		

Petition for Appointment of Guardian of Minor (Estate)

		See petition for details.	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p><u>Note:</u> Page 25 is a petition re the estate of this minor's sibling Scott, also 16.</p> <p><u>Note:</u> Pursuant to Local Rule 7.8.4.1, it is the policy of the court to block <u>all</u> funds in guardianship estates.</p> <p>3. If \$49,000.00 is to remain unblocked, bond including cost of recovery pursuant to Cal. Rule of Court 7.207 should be \$55,000.00.</p> <p>4. Need Order to Deposit Money Into Blocked Account (MC-355).</p> <p><u>Note:</u> If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> • Tuesday, July 21, 2015 for filing of bond and/or receipt for blocked account • Tuesday, Nov. 2, 2015 for filing of Inventory and Appraisal • Tuesday, Sept. 6, 2016 for filing the first account <p>If the proper items are on file pursuant to Local Rule 7.5, the status hearings may come off calendar.</p>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	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: skc		
		Reviewed on: 5/29/15		
		Updates:		
		Recommendation:		
		File 25 - Directo		

Petition for Letters of Administration. Authorization to Administer Under the Independent Administration of Estates Act

DOD: 02/25/15	DEBRA MOLINA , daughter, is Petitioner, and requests appointment as Administrator with full IAEA and without bond.	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> The Court will set status hearings as follows: <ul style="list-style-type: none"> Tuesday, Nov. 3, 2015 for the filing of the inventory and appraisal Tuesday, Sept. 13, 2016 for the filing of the first account or petition for final distribution. If the proper items are on file pursuant to local rules, the status hearings may be taken off calendar.
Cont. from	Full IAEA – OK	
<input type="checkbox"/> Aff.Sub.Wit.	All heirs waive bond	
<input checked="" type="checkbox"/> Verified	Decedent died intestate	
<input type="checkbox"/> Inventory	Residence: Selma	
<input type="checkbox"/> PTC	Publication: Selma Enterprise	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w/	
<input checked="" type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.	Estimated Value of the Estate:	
<input type="checkbox"/> Pers.Serv.	Personal property - \$ 5,000.00	
<input type="checkbox"/> Conf. Screen	Annual income - 4,050.00	
<input checked="" type="checkbox"/> Letters	Real property - 200,000.00	
<input checked="" type="checkbox"/> Duties/Supp	Total - \$209,050.00	
<input type="checkbox"/> Objections	Probate Referee: STEVEN DIEBERT	
<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: JF
		Reviewed on: 05/29/15
		Updates:
		Recommendation: SUBMITTED
		File 27 – Molina

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>Account period: 3/28/13 – 10/17/14 Accounting: <u>Not provided</u> Beginning POH: \$13,438.31 Ending POH: \$70,195.61 (\$1,715.61 plus a 1/5 interest in real property in Virginia valued at \$68,480.00)</p> <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>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			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified <input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg <input checked="" type="checkbox"/>		
<input type="checkbox"/>	Aff.Mail <input checked="" type="checkbox"/>		
<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 <input checked="" type="checkbox"/>		
<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: 5/28/15</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.*

Petitioner Olivarez, Richard (pro per – paternal grandfather)
 Petitioner Olivarez, Rosemary (pro per – paternal grandmother)
 Petition - Appoint Temporary Guardian

Isaiah, 10		<u>GENERAL HEARING: 07/21/15</u>		NEEDS/PROBLEMS/COMMENTS:	
Tristen, 8		<p>RICHARD OLIVAREZ and ROSEMARY OLIVAREZ, paternal grandparents of Tristen and Ashton, are Petitioners)</p> <p>Father (Isaiah): RONALD MOBLEY Father (Tristen & Ashton): SHAUN OLIVAREZ – deceased</p> <p>Mother: FRANCINE ESPARZA – Declaration of Due Diligence filed 05/28/15</p> <p>Paternal grandparents (Isaiah): UNKNOWN</p> <p>Maternal grandfather: ISACHE ESPARZA Maternal grandmother: TERRY ESPARZA</p> <p>Siblings: LARISSA ESPARZA, MICOLE ESPARZA</p> <p>Petitioners state [see Petition for details].</p>		<p>1. 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> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for:</p> <p>a. Ronald Mobley (Isaiah's father) b. Francine Esparza (mother)</p>	
Ashton, 4					
Cont. from					
	Aff.Sub.Wit.				
✓	Verified				
	Inventory				
	PTC				
	Not.Cred.				
✓	Notice of Hrg				
	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: JF			
		Reviewed on: 05/29/15			
		Updates:			
		Recommendation:			
		File 29 – Mobley & Olivarez			