



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.

Amended Second Account and Report of Successor Trustee and Petition for Allowance of Trustee Fees and Attorney Fee

	MARK OLSEN , private professional fiduciary, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Disbursement schedule shows charges for mileage totaling \$2,501.95. The trust owns a specialty van for the benefit of the minor. Therefore it appears that mileage is not an appropriate disbursement. – Declaration of Mark Olsen filed on 5/29/15 states he had followed the example of the original trustee of the special needs trust, Joanne Ringstrom, in paying mileage expense. Mr. Olsen states he will discontinue disbursements for mileage immediately.</p> <p>2. Order submitted does not comply with Local Rule 7.6C which states all orders settling accounts shall contain a statement as to the balance of the estate on hand, specifically noting the amount of cash included in the balance. Need new order.</p>
	Account period: 8/1/12 – 2/28/15	
Cont. from 050615	Accounting - \$550,206.69	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$335,240.14	
<input checked="" type="checkbox"/> Verified	Ending POH - \$354,371.88	
<input type="checkbox"/> Inventory	Current Bond is \$448,888.64 (sufficient)	
<input type="checkbox"/> PTC	Attorney - \$5,645.00	
<input type="checkbox"/> Not.Cred.	(per itemization and declaration, 25.2 hours @ \$200 to \$350 per hour)	
<input checked="" type="checkbox"/> Notice of Hrg	Trustee - \$11,723.00	
<input checked="" type="checkbox"/> Aff.Mail	(Trustee is allowed \$350 per month on account. He has been paid \$10,612.00 leaving a balance of \$1,111.00 outstanding)	
<input type="checkbox"/> Aff.Pub.	Petitioner prays for an Order:	
<input type="checkbox"/> Sp.Ntc.	1. Approving, allowing and settling the second account;	
<input type="checkbox"/> Pers.Serv.	2. Ratifying, confirming and approving the acts and transactions of Petitioner as Trustee;	
<input type="checkbox"/> Conf. Screen	3. Authorizing the Trustee's fee in the amount of \$11,723.00 of which \$1,111.00 remains unpaid;	
<input type="checkbox"/> Letters	4. Authorizing the Trustee to pay his attorney the sum of \$5,645.00 from the estate for services rendered.	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 5/29/15
		Updates:
		Recommendation:
		File 1 - Bustos

Note: If the petition is granted, status hearings will be set as follows:

- **Wednesday, April 26, 2017** at 9:00 a.m. in Department 303, for the filing of the third account.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

Accounting Eighteenth Account and Report of Co-Trustees and Petition for its Settlement, for Approval and Allowance of Trustees Compensation and Attorney's Fees for Authority to Deposit Funds to Blocked Account; and for Instructions to make Payments to Related Party on Behalf of Beneficiary

		MICHAEL PAPPACODA and JOYCE THOMAS, Co-Trustee, are petitioners.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Minute order dated 5/1/14 ordered the trustee's to itemize all fees on future accountings. This accounting still has the trustees receiving a portion of their fees as a percentage of the property on hand. Need Order. Local Rule 7.1 states a proposed Order shall be submitted with all pleadings that request relief. If the proposed order is not received in the Probate Filing Clerk's Office ten (10) days before the scheduled hearing, a continuance may be required. Need blocking Order. <p>Note: A status hearing will be set as follows:</p> <ul style="list-style-type: none"> Wednesday, February 24, 2016 at 9:00a.m. in Dept. 303 for the filing of the Nineteenth Account and Report of Trustees <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>
		Account period: 01/01/14 – 12/31/14	
Cont. from		Accounting - \$220,315.88	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$184,000.55	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$195,169.14	
<input type="checkbox"/>	Inventory	Bond has been waived.	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.	Trustees - \$2,901.69 (1% of the value of the assets for general services totaling \$1,951.69 plus 19 hours @ \$50/hr. (\$25/hr. for each trustee, totaling \$950.00) for specific services such as taking the beneficiary to appointments that require the presence of both trustees.)	
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	Attorney - \$2,902.50 (per itemization and declaration, 8.65 hrs. at \$300/hr. attorney time and 4.10 hrs. @ \$75/hr. paralegal time)	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen	Costs - \$200.00 (filing fees)	
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	2620(c)	Petitioner's state pursuant to the Order establishing the Trust, if the balance of the Trustee's checking account exceeds \$10,000.00 excess funds are to be transferred into the Trust's blocked account. The balance of the checking account currently exceeds \$10,000.00.	
<input checked="" type="checkbox"/>	Order	Petitioners request the authority to deposit the sum of \$10,000.00 to the blocked account.	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Please see additional page	
		Reviewed by: KT	
		Reviewed on: 5/29/15	
		Updates:	
		Recommendation:	
		File 1 - Goering	

Petitioner states as set forth in this accounting and as affirmed in the accountings filed over more than 15 years, the trustees have made payments to Joyce Thomas, mother of the beneficiary, and the person in whose home he resides for his special needs. Payments made monthly include:

PG&E	\$250.00
Care for the beneficiary	\$250.00
Housekeeping services	\$250.00
Cable TV	\$250.00

In addition telephone and internet services are provided to the residence with a portion paid by the trust and the balance paid by Joyce Thomas. During the accounting payments to AT&T were approximately \$95.00 per month. In addition, the Trustees reimbursed Joyce Thomas for various items purchased for the beneficiary.

Petitioners requests the authority to continue making payments to Joyce for the benefit of the beneficiary, subject, always, to review by the court upon the filing of each annual accounting.

Petitioners pray as follows:

1. That the Eighteenth Account and Report of Trustee is approved, allowed and settled;
2. That all acts and transactions of the Trustee and shown in the account be approved;
3. That the Trustees be allowed the sum of \$2,901.69 for their services as Trustees;
4. That the Attorney for the Trustee be allowed the sum of \$2,902.50 for his legal services rendered to said Trustees plus costs of \$200.00 during the account period.
5. That Trustee be instructed an directed to continue making payments to Joyce Thomas for housekeeping services, care services, cable television and to pay an equitable share of the AT&T charges.
6. That the Trustees be authorized and directed to deposit the sum of \$10,000.00 to the trust's blocked account.

5 Savanna Makai McJamerson & Niahlee Lowe (GUARD/P)

Case No. 09CEPR00559

Attorney: Cindy J. Hopper (for Petitioner Frances Ramos)

Probate Status Hearing RE: Possible Visitation Orders

		GENERAL HEARING (Niahlee only) 7/7/15	NEEDS/PROBLEMS/COMMENTS:
		FRANCES RAMOS , maternal great grandmother was appointed temporary guardian of Niahlee on 5/20/15.	
Cont. from		FRANCES RAMOS was previously appointed as guardian of Savanna on 9/23/09.	
Aff.Sub.Wit.		At the hearing for appointment of temporary guardian for Niahlee the court granted the temporary guardianship and set this status hearing for possible visitation orders.	
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
			Reviewed by: KT
			Reviewed on: 5/29/15
			Updates:
			Recommendation:
			File 5 – McJamerson & Lowe

DOD: 07/29/10	FRANK HINE , Administrator, filed a First Account and Report of Administrator on 03/02/15 that was set for hearing on 04/15/15.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	On 04/14/15, a Request to Withdraw First Account was filed requesting to withdraw the first account.	1. Need Amended First Account and Report of Administrator and/or updated status report.
Aff.Sub.Wit.		
Verified		
Inventory		
PTC	Minute Order from 04/15/15 set this matter for a status hearing regarding filing a new Accounting.	
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: 05/29/15
		Updates:
		Recommendation:
		File 6 – Hine

7 Destiny Castellanos & Gage Castellanos (GUARD/P) Case No. 11CEPR01096

Petitioner Castellanos, Jesse Jr. (pro per – father)

Petition for Visitation

Destiny, 4	JESSE CASTELLANOS, JR., father, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Visitation</i> or Declaration of Due Diligence for: <ul style="list-style-type: none"> - Lucia De La Rosa (guardian of Destiny) - Moises Castellanos (guardian of Destiny) - Manjit Singh (guardian of Gage) - Kamaljit Singh (mother) - Jesse Castellanos, Sr. (paternal grandfather) - Linda Beltran (paternal grandmother) - Gurchhinder Singh (maternal grandfather) - Piari Singh (maternal grandmother)
Gage, 5	LUCIA DE LA ROSA and MOISES CASTELLANOS, paternal great aunt and great uncle, were appointed Co-Guardians of Destiny on 02/15/12.	
Cont. from	MANJIT SINGH, maternal aunt, was appointed Guardian of Gage on 06/04/13.	
Aff.Sub.Wit.	Mother: KAMALJIT SINGH	
✓ Verified	Paternal grandfather: JESSE CASTELLANOS, SR.	
Inventory	Paternal grandmother: LINDA BELTRAN	
PTC	Maternal grandfather: GURCHHINDER SINGH	
Not.Cred.	Maternal grandmother: PIARI SINGH	
Notice of Hrg	Petitioner requests to change his visitation from supervised to unsupervised.	
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: 05/29/15
		Updates:
		Recommendation:
		File 7 - Castellanos

DOD: 10/3/1994	<p>ROBERT L. JOHNSON was appointed Administrator without bond and with Limited IAEA authority on 7/31/12.</p> <p>Letters issued 7/31/12.</p> <p>I & A filed on 9/11/12 shows an estate valued at \$40,000.00</p> <p>Minute order dated 7/31/12 set status hearing on 10/4/13 for the filing of the First Account or Petition for Final Distribution. Minute order indicates Mr. Rindlisbacher was present.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 4/22/15. Minute Order states Counsel advises that he needs to have the property reappraised; he requests 6 weeks. No appearance is necessary on 6/3/15 if the petition is filed by 6/1/15.</p> <p>1. Need first account, 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> <p>Examiner notes Sam Johnson Jr. survived the decedent (petition for probate indicates he died in 2004 or 2005) and declaration filed on 7/23/14 states Sam passed away after the decedent. Therefore, the estate of Sam Johnson Jr. is the other beneficiary of this estate and not his two children.</p>
Cont. from 100413, 121313, 032814, 072514, 111214, 042215		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
Reviewed by: KT		
Reviewed on: 5/29/15		
Updates:		
Recommendation:		
File 8 - Johnson		

9 Linda Collins (Estate) Case No. 13CEPR00161

Petitioner Scheidt, Kathy Sophia (Pro Per – Executor – Petitioner)

~~Petition for Settlement of First and Final Account, and For Final Distribution~~
Ex Parte Petition for Order Confirming Sale of Personal Property

DOD: 1/27/13		<p>KATHY SOPHIA SCHEIDT, Executor with no IAEA and without bond, is Petitioner.</p> <p>Note: Both heirs filed waivers of accounting; however, accounting is provided as follows:</p> <p>Account period: 1/27/13-3/12/15 Accounting: \$78,773.94 Beginning POH: \$13,538.94 Ending POH: \$26,813.07 (cash)</p> <p>Executor (Statutory) Waived</p> <p>Distribution pursuant to decedent's will:</p> <p>Mary Ann Basinger: \$13,406.54 Kathy Sophia Scheidt: \$13,406.53</p> <p>Update: On 5/28/15, Petitioner filed an Amended Petition that is set for hearing on 6/29/15, as well as an Ex Parte Petition for Order Confirming Sale of Personal Property.</p> <p>Upon ex parte review on 5/28/15, Judge Kazanjian stated that she wished to review this petition at the hearing on 6/3/15.</p> <p>Petitioner states: Petitioner believed she had authority to sell property with consent of her sister Mary Ann Basinger, who is the only other beneficiary. The Probate Referee appraised the decedent's vehicle at \$12,750.00; however, Kelley Blue Book value was \$9,850.00. Carmax indicated they would pay \$4,000.00. They listed the car for several weeks and after receiving no response, Petitioner decided to sell the vehicle to to Jamiel Haddad for \$6,000.00 because it didn't appear they were going to get more than that and the insurance was about to come due again, which would have been another expense to the estate. They had already put a lot of their own money to cover their mom's expenses and agreed to accept that amount. It is requested that the Court confirm the sale of the vehicle to Jamiel Haddad for the sum of \$6,000.00.</p>	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Note: An Amended Account/ Petition for Final Distribution has been filed and set for 6/29/15; however, this hearing was not taken off calendar because the Court wished to address Petitioner's Ex Parte Petition for Order Confirming Sale of Real Property at this hearing on 6/3/15.</p> <p>Note: The issues regarding the accounting are omitted in these Examiner Notes since an amended petition has been filed.</p>
Cont from 042915			
<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 type="checkbox"/>	Notice of Hrg <input type="checkbox"/>		
<input type="checkbox"/>	Aff.Mail <input 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 4/2/13		
<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"/>		
<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 <input type="checkbox"/>		

Reviewed by: skc
Reviewed on: 5/29/15
Updates:
Recommendation:
File 9 - Collins

Status Re: First and Final Account and Report of Executor With Will, and Petition for Final Distribution

DOD: 1-28-13	FRESNO COUNTY PUBLIC ADMINISTRATOR	NEEDS/PROBLEMS/COMMENTS:
	was appointed personal representative on 3/4/15.	1. Need account or petition for final distribution or status report.
Cont from 010715	History: LUPE GALINDO , Niece, was appointed as Executor with Full IAEA without bond on 10/28/13.	Note: The deficiencies of the former Executor's petition included the following:
<input type="checkbox"/> Aff.Sub.Wit.		<ul style="list-style-type: none"> The petition did not contain an accounting according to the Probate Code. The estate did not appear to be in a condition to close. Notice of Hearing was deficient. Filing Fees of \$870.00 are due prior to distribution. Probate Code §§ 9202(b) and 9202(c) (notice to Victim Compensation and Franchise Tax Board) were not addressed.
<input checked="" type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory	I&A filed 3-7-14 consists of real property valued at \$170,000.00.	
<input checked="" type="checkbox"/> PTC		
<input checked="" type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	The California Department of Health Care Services originally filed a claim on 10/8/13 for \$148,510.68, but later amended the claim on 1/13/14 to \$98,508.40.	
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	On 11/20/14, Ms. Galindo filed a First and Final Account and Petition for Final Distribution in which she stated that she had submitted a hardship waiver to DHS and requested distribution of the real property to her, as she resides in the estate real property.	
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt	Examiner Notes listed numerous deficiencies with the petition that have not been cured. At the continued hearing on 3/4/15, the Court removed Ms. Galindo and appointed the Public Administrator as personal representative. The Court ordered Ms. Galindo to provide all documents and information regarding the estate to the Public Administrator by 3/25/15 and set this status hearing.	
<input type="checkbox"/> CI Report		
<input 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		
		Note: The estate was opened with a fee waiver. At this time, filing fees of \$870.00 are due for the filing of the initial petition for probate and the petition for final distribution. Filing fees must be paid prior to distribution.
		Note: Requests for special notice have been filed by DHS and by Probate Referee Steven Diebert.
		Reviewed by: skc
		Reviewed on: 5/29/15
		Updates:
		Recommendation:
		File 18 - Samora

Guardian: Hilda Bush (pro per)

Petitioner: John Michael Adams (pro per)

Petition for Visitation

		<p>JOHN MICHAEL ADAMS, father, is petitioner.</p> <p>HILDA BUSH, paternal aunt, was appointed guardian on 4/29/15.</p> <p>Mother: NOVELLE BROWN</p> <p>Petitioner states he would like visitation on a regular basis one day per week, birthdays and some holidays.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service of the Notice of Hearing on: <ol style="list-style-type: none"> a. Hilda Bush (guardian) 	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			X
<input type="checkbox"/>	Aff.Mail			X
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<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 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>Reviewed by: KT</p> <p>Reviewed on: 5/29/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11 – Winchester & Adams</p>		

Petition for Termination of Guardianship

Mikenzi, age 8	HAILEY SORRELLS, mother, and JUSTIN SORRELLS, father of Justin, are Petitioners.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 04/22/15</u> Minute Order from 04/22/15 states: Examiner notes provided in open court; the paternal grandfather of Mikenzi needs to be properly noticed. As of 05/29/15, nothing further has been filed. 1. Need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Termination of Guardianship <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: a. Mikenzi's Paternal grandfather
Justin, age 3	JOHNNY CLIFFORD BURT and KIMBERLY BURT, Maternal Grandfather and step-grandmother, were appointed guardians on 1-8-14. – Served by mail with Notice of Hearing only on 02/11/15	
Cont. from 030415, 042215	Father (Mikenzi): DUANE BRANNUM - Served by mail with Notice of Hearing only on 02/11/15	
<input type="checkbox"/> Aff.Sub.Wit.	Paternal Grandfather (Mikenzi): UNKNOWN	
<input checked="" type="checkbox"/> Verified	Paternal Grandmother (Mikenzi): VIOLA BRANNUM - Served by mail with Notice of Hearing only on 02/11/15	
<input type="checkbox"/> Inventory	Paternal Grandfather (Justin): TOBIE SORRELLS – consents and waives notice	
<input type="checkbox"/> PTC	Paternal Grandmother (Justin): LEITA TEAGUE – consents & waives notice	
<input type="checkbox"/> Not.Cred.	Maternal Grandmother: SHELLEY O'HANESIAN – consents and waives notice	
<input checked="" type="checkbox"/> Notice of Hrg	Petitioner states [See Petition for details].	
<input checked="" type="checkbox"/> Aff.Mail	Court Investigator Julie Negrete filed a report on 02/25/15.	
<input type="checkbox"/> Aff.Pub.	Court Investigator Julie Negrete filed a supplemental report on 04/15/15.	
<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 checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed on: 05/29/15
		Updates:
		Recommendation:
		File 12 – Burt & Sorrells

First and Final Account and Report of Executor and Petition for Its Settlement, for Allowance of Compensation to Executor and Attorney for Ordinary Services and for Final Distribution

DOD: 12/19/13	BRET HELGREN , Executor with Full IAEA without bond, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Supplemental Inventory and Appraisal filed 4/10/15 is missing Attachment 1 indicating the assets valued by the Executor at \$25,447.30. Need Amended Supplemental I&A. The petition indicates that various personal property assets (furniture, appliances) were sold with the house; however, these assets do not appear to have been inventoried as assets of the estate. If these items are part of the missing Attachment 1 noted above, then they would have required appraisal by the Probate Referee. Need clarification. <u>Note:</u> Improper valuation affects statutory compensation calculation. The petition indicates that the “gains” on the sale of the house were primarily due to the personal property assets (furniture, appliances) that were included in the sale. This does not appear to be a proper charge, especially if these were inventoried assets. Need clarification. <u>Note:</u> This also affects statutory compensation calculation. Petitioner made advance distributions prior to court authorization in violation of Probate Code §11620. Need receipts from Lyell Chadwick and Geoffrey Chadwick for their preliminary distributions of \$1,000.00 each.
	Account period: 1/27/14 – 4/16/15 Accounting: \$398,615.97 Beginning POH: \$395,447.30 Ending POH: \$354,698.96 (cash)	
<input type="checkbox"/> Aff.Sub.Wit.	Executor (Statutory): \$10,966.32	
<input checked="" type="checkbox"/> Verified	Attorney (Statutory): \$10,966.32	
<input checked="" type="checkbox"/> Inventory	Costs: \$820.00 (appraisal, filing)	
<input checked="" type="checkbox"/> PTC	Petitioner has made advance distributions pursuant to notice of proposed action of \$4,000.00 as follows: Bret Helgren: \$2,000.00 Lyell Chadwick: \$1,000.00 Geoffrey Chadwick: \$1,000.00	
<input checked="" type="checkbox"/> Not.Cred.	Petitioner discloses that he hired his father, Don Helgren, as a contractor for repair, painting, clean-up of the estate real property.	
<input checked="" type="checkbox"/> Notice of Hrg	Distribution pursuant to Decedent's will is to: Bret Helgren: \$165,973.16 Lyell Chadwick: \$82,986.58 Geoffrey Chadwick: \$82,986.58	
<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	7/14/14	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input checked="" type="checkbox"/> FTB Notice		
		Reviewed by: skc
		Reviewed on: 5/29/15
		Updates:
		Recommendation:
		File 13 - Chadwick

Order to Show Cause

		<p>TWIONESHIA NACOLE MILES, mother, was appointed as Guardian of the Estate on 2/25/15. The Court ordered that all funds (\$20,000.00) be placed into a blocked account.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 5/6/15: Ms. Miles represents that she has not yet received the funds from "Standard Insurance." The Court orders Ms. Miles to bring proof of any correspondence between herself and the insurance company. Should Ms. Miles receive the funds, she is ordered to place the funds into a blocked account immediately and file the proof. Ms. Miles is ordered to be personally present in court on 6/3/15.</p> <p>1. Need Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked Account.</p> <p>Note: A Status Hearing is set for 7/22/15 for filing of the Inventory & Appraisal.</p>
Cont from 050615		<p>Minute Order from 2/25/15 set status hearing for Receipt for Blocked Account on 4/15/15.</p>	
Aff.Sub.Wit.			
Verified		<p>On 4/15/15, there were no appearances. The Court issued this Order to Show Cause to Twioneshia Miles as to why she should not be removed as Guardian for failure to file the receipt for blocked account. Ms. Miles is ordered to be personally present in Court on 5/6/15.</p>	
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>Reviewed by: skc</p> <p>Reviewed on: 5/29/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 15 - Dupree</p>

16 Beauty Deminson, Chozin Deminson & Asante Tucker (GUARD/P)

Case No. 14CEPR01073

Atty Davis, Yvonne (pro per – maternal grandmother/Petitioner)
 Atty Davis, Derrell (pro per – maternal grandfather/Petitioner)
 Atty Deminson, Quiana (pro per Mother/objector)

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

Asante, 11	<u>TEMPORARY EXPIRES 06/03/15</u>	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p><u>CONTINUED FROM 04/22/15</u> Minute Order from 04/22/15 states: Examiner notes provided in open court. Arlene Sullivan and Larry Tucker are the paternal grandparents of Asante, and they were noticed. The late-filed Declaration of Due Diligence is not in the Court's file.</p> <ol style="list-style-type: none"> Need proof of service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person or Consent & Waiver of Notice or Declaration of Due Diligence for: <ol style="list-style-type: none"> Robert Deminson, III – personal service required (unless diligence is found) Barbara Deminson (Jenkins Thomas) – service by mail sufficient (unless diligence is found)
Chozin, 7	YVONNE DAVIS and DERRELL DAVIS , maternal grandparents, are Petitioners.	
Beauty, 1	Father (Beauty & Chozin): ROBERT DEMINSON III – <i>Declarations of Due Diligence filed 02/24/15, 04/21/15 and 05/21/15 states that efforts to locate him have been unsuccessful and his current whereabouts is unknown</i>	
Cont. from 012815, 030415, 042215		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Father (Asante): ASANTE TUCKER - Deceased	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Mother: QUIANA DEMINSON	
<input checked="" type="checkbox"/> Aff.Mail w/	Paternal grandfather (Beauty & Chozin): ROBERT DEMINSON, SR. – served by mail on 03/30/15 (Robert Deminson, Jr. also served by mail on 03/30/15)	
<input type="checkbox"/> Aff.Pub.	Paternal grandmother (Beauty & Chozin): BARBARA DEMINSON (Jenkins Thomas) – <i>Declaration of Due Diligence filed 04/03/15 states that an address could not be found</i>	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv. X	Paternal grandfather (Asante): LARRY TUCKER – served by mail on 03/30/15	
<input checked="" type="checkbox"/> Conf. Screen	Paternal grandmother (Asante): ARLENE SULLIVAN – served by mail on 03/30/15	
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections	Petitioners state [see Petition for details].	
<input type="checkbox"/> Video Receipt	Court Investigator Charlotte Bien filed a report on 01/14/15.	
<input checked="" type="checkbox"/> CI Report	Objections to Guardianship filed by mother, Quiana Deminson (Davis), on 1/27/15. Objector states she wishes the return of her children. She would like to start with a family reunification plan while she gets treatment in the program Spirit of Women. Giving her a chance to prove herself to the court that she can and will become sober and a protective mother to her children.	
<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	Declaration filed 04/27/15 by mother, Quiana Deminson (Davis) attaches letters from Spirit of Women showing that she is currently enrolled in their program and doing well, she wishes to have overnight visits with her children while she is in the program.	

Reviewed by: JF
Reviewed on: 05/29/15
Updates:
Recommendation:
File 16 – Demison & Tucker

17 Richard Joseph Shannon (CONS/PE) Case No. 14CEPR01149

Attorney: Brian H. Fray (for Conservator Catherine Mary Kelley)

Attorney: Nancy J. LeVan (Court appointed for Conservatee)

Probate Status Hearing re: Filing Inventory & Appraisal

		<p>CATHERINE MARY KELLEY was appointed conservator of the person and estate with bond set at \$25,740.00 on 2/2/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. This case has fees owing for the court investigation. \$500.00 for the investigation on the temporary conservatorship and \$547.00 for the investigation on the general conservatorship for a total owing of \$1,047.00. 2. Need inventory and appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Cont. from		<p>Minute Order dated 2/2/15 set this status hearing for the filing of the inventory and appraisal.</p>	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<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 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: KT</p>
			<p>Reviewed on: 5/29/15</p>
			<p>Updates:</p>
			<p>Recommendation:</p>
			<p>File 17 - Shannon</p>

Probate Status Hearing RE: Filing of the Inventory and Appraisal

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>OFF CALENDAR. Inventory and appraisal filed. Petition for final distribution set on 7/1/15.</p>
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<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 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 18 - Fouty

	See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Petitioner resides in Salinas, CA.</p> <p>Minute Order 5/6/15: The Court orders Willow Shannon to go over to the Clerk's office forthwith and set up an appointment to meet with the Court Investigator and provide correct contact information.</p> <p>1. If diligence not found, need notice to paternal grandparents pursuant to Probate Code §1511.</p>
		Reviewed by: skc
		Reviewed on: 5/29/15
		Updates:
		Recommendation:
		File 22 - Shannon

Cont from 050615					
	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				
✓	Clearances				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				

**23 Myrna L. Parks, aka Myrna Louise Parks, Case No. 15CEPR00261
Myrna Parks, Myrna Louise Bell, Myrna Bell (Estate)**

**Attorney Young, Brian D., of Oakland, and Yee, Robert B., of San Francisco, for
Wendy M. Pelote – Daughter – Petitioner)**

**Petition for Probate of Nondomiciliary Decedent's Will and for Letters Testamentary;
Authorization to Administer Under IAEA (Prob. C. 8002, 10450)**

DOD: 4/15/14	WENDY M. PELOTE , Daughter and named Executor without bond, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> The Court will set status hearings as follows:</p> <ul style="list-style-type: none"> • Wednesday, Nov. 4, 2015 for filing the Inventory and Appraisal • Wednesday, Sept. 7, 2016 for filing the first account or petition for final distribution <p>If the proper items are on file prior to the status hearing dates pursuant to Local Rule 7.5., the status hearings may be taken off calendar.</p>
	Petitioner is a resident of California.	
	Petitioner is a resident of California.	
Cont from 042715		
<input type="checkbox"/> Aff.Sub.Wit.	Full IAEA - ok	
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory	Will dated 11/10/06, which has been duly proved, allowed, and admitted to informal probate in the Superior Court of Arizona, Pima County, on 1/8/15.	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Residence: Tucson, Pima County, AZ	
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	The decedent owned interest in real property in Fresno County, CA.	
<input checked="" type="checkbox"/> Aff.Pub.	Publication: Fresno Bee	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Estimated value of estate:	
<input type="checkbox"/> Conf. Screen	Real property: \$400,000.00	
<input checked="" type="checkbox"/> Letters	Annual income: \$ 1,000.00	
<input checked="" type="checkbox"/> Duties/Supp	Total: \$401,000.00	
<input type="checkbox"/> Objections	Probate Referee: Rick Smith	
<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 on: 5/29/15
		Updates:
		Recommendation: SUBMITTED
		File 23 - Parks