

Age: 18	DANIEL GUTERREZ and JANICE GUTERREZ , Co-Guardians of the Estate, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	DANIEL GUTERREZ and JANICE GUTERREZ , parents, were appointed as Co-Guardians of the Estate on 10/07/02.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Paternal grandfather: PRIMITIVIO GUTERREZ	
<input type="checkbox"/> Inventory	Paternal grandmother: JESSE GUTERREZ	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Maternal grandfather: JOEL CRISWELL	
<input checked="" type="checkbox"/> Notice of Hrg	Maternal grandmother: JUANTIA CRISWELL	
<input checked="" type="checkbox"/> Aff.Mail w/	Siblings: JOEY MCCLAIN, MICHAEL GUTERREZ	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Petitioners allege Anyssa has reached the age of 18. She has been accepted to college and wants to use the funds for her education.	
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Dufies/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report n/a		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<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: 05/29/13
		Updates: 06/03/13
		Recommendation:
		File 1A – Gutierrez

(1) First and Final Account and Report of Guardian of the Estate and (2) Petition for Attorney's Fees, (3) Reimbursement of Costs Advanced; and (4) Authority to Deliver Assets [Prob. C. 1600; 2467; 2627; 2630; 2640]

Age: 18	DANIEL GUTIERREZ and JANICE GUTIERREZ , Co-Guardians of the Estate, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 10/07/02 – 04/01/13	1. Need Order.
Cont. from	Accounting - \$78,039.00	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$54,826.80	
<input checked="" type="checkbox"/> Verified	Ending POH - \$78,039.00	
<input type="checkbox"/> Inventory	(all cash)	
<input type="checkbox"/> PTC	Guardians - waived	
<input type="checkbox"/> Not.Cred.	Attorney - \$3,339.00	
<input checked="" type="checkbox"/> Notice of Hrg	(per itemization for 13.3 hours at \$265/hr. for preparation of documents, correspondence with bank, meetings with clients and court appearance)	
<input checked="" type="checkbox"/> Aff.Mail w/	Costs - \$574.50 (for filing fees, copies, and postage for notice to more than 10 recipients)	
<input type="checkbox"/> Aff.Pub.	Petitioners pray for an Order:	
<input type="checkbox"/> Sp.Ntc.	1. Approving, allowing and settling the First & Final Account;	
<input type="checkbox"/> Pers.Serv.	2. Authorizing the attorneys' fees and costs;	
<input type="checkbox"/> Conf. Screen	3. Authorizing the guardians to deliver the property remaining on hand to Anyssa Michaih Gutierrez;	
<input type="checkbox"/> Letters	4. Authorizing the withdrawal of funds from blocked account and directing Union Bank of California to distribute the account to the payees as described in the Order for Withdrawal of Funds From Blocked Account; and	
<input type="checkbox"/> Duties/Supp	5. Discharging Daniel J. Gutierrez and Janice S. Gutierrez as guardians of the estate after the expiration of 1 year and upon filing of the requisite receipt(s).	
<input type="checkbox"/> Objections		Reviewed by: JF
<input type="checkbox"/> Video Receipt		Reviewed on: 05/29/13
<input type="checkbox"/> CI Report		Updates: 06/03/13
<input checked="" type="checkbox"/> 2620(c)		Recommendation:
<input type="checkbox"/> Order x		File 1B – Gutierrez
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		

Amended First and Final Account and Petition for Settlement of Account,
 Amended Final Report and Petition for Approval of Final Report, for Allowance of
 Attorneys' Compensation, for Allowance of Costs Advanced, for Final Distribution,
 and for Deposit of Funds into Blocked Account (Prob. C. 10951)

DOD: 01/15/11	PHILIP ANDREW MOUNTS , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 01/15/11 – 04/17/13	
Cont. from	Accounting - \$217,052.05	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$96,000.00	
<input checked="" type="checkbox"/> Verified	Ending POH - \$24,551.67 (\$24,051.67 is cash)	
<input checked="" type="checkbox"/> Inventory	Executor - waived	
<input checked="" type="checkbox"/> PTC	Attorney - \$4,946.56 (statutory)	
<input checked="" type="checkbox"/> Not.Cred.	Attorney x/o - \$2,002.50 (per itemization for 8.9 hours @ \$225/hr. for work associated with the purchase of the real property asset of the estate by the Executor and includes: preparation of documents, legal research, court appearances and correspondence with client)	
<input checked="" type="checkbox"/> Notice of Hrg	Costs - \$861.00 (Publication, probate referee, filing fees)	
<input checked="" type="checkbox"/> Aff.Mail w/	Closing - \$1,000.00	
Aff.Pub.	Distribution, pursuant to decedent's will, is to:	
Sp.Ntc.	Dylan Jeffrey Mounts (a minor) - \$7,620.80 (to be deposited into a blocked account), plus ½ interest in personal property (valued at \$250)	
Pers.Serv.	Taylor Loryn Mounts (a minor) - \$7,620.80 (to be deposited into a blocked account), plus ½ interest in personal property (valued at \$250)	
Conf. Screen		
Letters 04/21/11		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
<input checked="" type="checkbox"/> 9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
<input checked="" type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 05/30/13
		Updates:
		Recommendation:
		File 2 – Mounts

Petition for Court Establishment of Special Needs Trust- First Party Special Needs
Trust for Litigation Proceeds

Age: 8	MICHAELA LOZANO , by and through her Guardian ad Litem MELISSA LOZANO , is Petitioner.	NEEDS/PROBLEMS/COMMENTS: Note: Upcoming hearing re compromise in 13CECG00526 is 6-11-13 Dept. 402. 1. The trust names Larry Balakian as "Trust Protector," who may be entitled to compensation and appears to serve as an alternate trustee and hold additional authority. The Court may require clarification as to this person's role and anticipated compensation – relationship, qualifications, duties, rates, access, authority, etc. (Please see descriptions in trust document). 2. The Court may require clarification as to good cause regarding the request to invest in mutual funds and government bonds with maturity dates later than five years. Cal. Rules of Court 7.903(c)(4). Note: If granted, the Court will set status hearings as follows: <ul style="list-style-type: none"> • Friday 7-19-13 for filing proof of bond in the amount of \$140,379.50 • Friday 9-20-13 for filing Inventory and Appraisal • Friday 9-19-14 for filing the first account <u>If the requisite items are filed appropriately, these status hearing dates may be taken off calendar.</u>
	Petitioner states: The minor is disabled due to Dravet Syndrome, a childhood epilepsy syndrome caused by a genetic mutation which results in debilitating seizures. She is a Medi-Cal recipient. A claim was brought against Clovis Unified School District and Supplemental Health Care for an incident that occurred on 10-20-11 (description attached). The claim has been settled prior to filing formal litigation and a petition to compromise is currently pending in related case 13CECG00526. The minor will receive approx. \$123,224.30 after allowing for fees and expenses from the settlement, which if provided directly to the minor would eliminate her Medi-Cal eligibility. Therefore, Petitioner seeks an order that the assets from the settlement be paid directly to the trustee of the Michaela Dawn Lozano Special Needs Trust, which is authorized under Probate Code §§ 3602-3613, and an order that Melissa Lozano, mother and proposed GAL, and Donald Lozano, father, are authorized to sign the proposed trust as grantors.	
Cont. from 051413	The proposed SNT (attached) meets the requirements of 42 <i>United States Code</i> 1396(d)(4)(A) and provides for Medi-Cal reimbursement. Petitioner states the proposed beneficiary meets all requirements for creation of the proposed SNT.	
Aff.Sub.Wit.	Petitioner also requests that the investment standard set forth in Probate Code §2574(a) be modified so that the trustee has the authority to purchase mutual funds and US Government bonds with maturity dates later than five years.	
✓ Verified	Petitioner requests that Melissa Lozano and Donald Lozano (parents) be appointed as initial co-trustees with bond of \$126,921 based on trust assets plus one years' annual income estimated at 3% \$3,696.73.	
Inventory	Petitioner requests to pay Attorney Miller \$1,750 for preparation of this special needs trust, plus \$535 in costs, including filing fees and \$100 in attorney service charges from an outside agency.	
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		

SEE ADDITIONAL PAGES

Examiner notes certain features of the SNT (Attachment 5) as follows:

- Initial Trustees: Melissa Lozano and Donald Lozano (parents)
- Successor Trustee: Michael Kenney (grandfather)
- Alternate Successor Trustee: Judith Kenney (grandmother)
- Trust Protector: Larry Balakian, with right to appoint Successor Trust Protector and right to remove and appoint trustees, with Court confirmation, no duty to monitor administration or exercise authority, etc.
- Trustee to have investment powers as requested herein
- See SNT for additional details.

Petitioner prays that the Court make the following findings and Order:

1. That all notices have been given as required by law;
2. That the Court establish the *Michaela Dawn Lozano Special Needs Trust* and that Melissa Lozano and Donald Lozano are directed to execute it;
3. That the Court has continuing jurisdiction over the *Michaela Dawn Lozano Special Needs Trust*;
4. That Melissa Lozano and Donald Lozano shall serve as the initial Trustees of the *Michaela Dawn Lozano Special Needs Trust* with bond set at \$140,379.50.
5. That Michaela Lozano has a disability that substantially impairs her ability to provide for her own care or custody and constitutes a substantial handicap;
6. That Michaela Lozano is likely to have special needs that will not be met without the trust;
7. That money to be paid to the trust does not exceed the amount that appears reasonably necessary to meet Michaela Lozano's special needs;
8. That the payment of all monies due Petitioner in the claim, *Michaela Lozano, by and through her Guardian ad Litem, Melissa Lozano v. Clovis Unified School District and Supplemental Health Care* shall be paid to the trustee of the Special Needs Trust after payment of fees;
9. That any proceeds of the settlement award received by Petitioner's attorney before the hearing of this Petition and deposited in attorney's attorney/client trust account shall not be considered received by Michaela Lozano for public benefit eligibility purposes;
10. That the assets of the trust estate are unavailable to the beneficiary and shall not constitute a resource to Michaela Lozano for Michaela Lozano's financial eligibility for Medi-Cal, SSI, regional center assistance, or any other program of public benefits;
11. That the trustee provide the Court with a biennial account and report of the *Michaela Dawn Lozano Special Needs Trust* beginning with the period 1 year after the date the Court approves the establishment of the trust and every 2 years thereafter;
12. That the trustee is authorized to invest in mutual funds and in US government bonds with maturity dates later than five years;
13. That the Court approve and direct payment of \$1,750.00 to attorney Jennifer A. Miller for legal services rendered and \$435.00 for out of pocket expenses; and
14. That such other and further orders be issued by the Court as it may deem just and proper.

Atty Markeson, Thomas A., of Wild, Carter & Tipton (for Petitioner Vincent Kosorek)

Petition for Instructions Regarding Distribution of Trust Assets and/or Interpretation of Trust Instrument [Prob. C. 17200]

Betty DOD: 11/23/2006	VINCENT KOSOREK , Successor Trustee of the HAUSDORF FAMILY 2006 TRUST , is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Ronald DOD: 6/14/2012	Petitioner states:	
	<ul style="list-style-type: none"> Ronald Hausdorf created the HAUSDORF FAMILY 2006 TRUST for the benefit of his wife, BETTY F. HAUSDORF (copy attached as Exhibit A); the Hausdorfs had no children; Petitioner believes that Ronald, a non-lawyer, either prepared the Trust himself or used the services of a paralegal; 	
Cont. from	<ul style="list-style-type: none"> Petitioner [is named in the Trust and] has acted as Trustee since Ronald's death on 6/14/2012, and has served a Notice of Trust to the beneficiaries pursuant to Probate Code § 16061.7, and the time to challenge the Trust has expired; 	
<input type="checkbox"/> Aff.Sub.Wit.	<ul style="list-style-type: none"> Petitioner has reduced the assets to cash, totaling ~\$550,000.00; the Trust estate is ready for distribution; assets of the Trust included a residence located in Monterey; the Hausdorfs had lived in Monterey for at least 15 years prior to the date the Trust was established; 	
<input checked="" type="checkbox"/> Verified	<ul style="list-style-type: none"> The Trust calls for the following distributions: 	
<input type="checkbox"/> Inventory	(A) 15% to the PACIFIC GROVE SEVENTH DAY ADVENTIST CHURCH in Pacific Grove, CA;	
<input type="checkbox"/> PTC	(B) 15% to the KOREAN SEVENTH DAY ADVENTIST CHURCH in Marina, CA;	
<input type="checkbox"/> Not.Cred.	(C) 30% to MARLENE PERSHELL [closest blood relative]; and	
<input checked="" type="checkbox"/> Notice of Hrg	(D) 40% to the COMMUNITY FOUNDATION FOR MONTEREY COUNTY ;	
<input checked="" type="checkbox"/> Aff.Mail	~Please see additional page~	Reviewed by: LEG
<input type="checkbox"/> Aff.Pub.		Reviewed on: 5/30/13
<input type="checkbox"/> Sp.Ntc.		Updates: 5/31/13
<input type="checkbox"/> Pers.Serv.		Recommendation:
<input type="checkbox"/> Conf. Screen		File 4 – Hausdorf
<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		

Petitioner states, continued:

- Petitioner seeks instructions regarding the distributions contained in the Trust terms to the two Seventh Day Adventist Churches, as follows:
 1. **Pacific Grove Seventh Day Adventist Church:** Petitioner has been unable to find a church with the exact name of "Pacific Grove Seventh-Day Adventist Church;" Petitioner located a church in Pacific Grove with the name "Monterey Peninsula Seventh-Day Adventist Church" on Lighthouse Ave. in Pacific Grove; Petitioner has been unable to find any evidence of any other Seventh-Day Adventist church being located in Pacific Grove;
 - a. **Declaration of Donald R. Kellogg, M.D.,** Head Elder of the church (*attached as Exhibit B*), states that church is the only Seventh-day Adventist church in Pacific Grove, and that there has never been another Seventh-day Adventist church in Pacific Grove during the 40 years he has been attending the church;
 - b. **Declaration of Todd Paige** (*attached as Exhibit C*) supports Dr. Kellogg's belief; Mr. Paige works for the Central California Conference of Seventh-day Adventists, which owns the church on Lighthouse Ave.; to Mr. Paige's knowledge, there is no other Seventh-day Adventist church in Pacific Grove, other than the one located on Lighthouse Ave.

Because it is the only such church in Pacific Grove, Petitioner believes that [Ronald] intended to name the Monterey Peninsula Seventh-day Adventist Church located in Pacific Grove as a beneficiary; accordingly, Petitioner seeks an instruction that [the Monterey Peninsula Seventh-day Adventist Church] is a proper recipient of **15%** of the Trust assets.

2. **Korean Seventh Day Adventist Church:** Petitioner has been unable to find a church with the exact name of "Korean Seventh Day Adventist Church" located in Marina, CA; Petitioner has located a church with the name of "Monterey Korean Seventh-day Adventist Church;"
 - a. **Declaration of Byung Chul Shin,** Pastor of the church (*attached as Exhibit D*), states the church was located in Marina on 10th Street until October of 2012; at that point the church moved to California Street in Salinas (retaining the name Monterey Korean Seventh-day Adventist Church); to the knowledge of Pastor Shin, there has never been another Korean Seventh-day Adventist church in Marina;
 - b. **Declaration of Todd Paige** (*attached as Exhibit C*) supports Pastor Shin's assertion; to the knowledge of Mr. Paige, there has never been a Korean Seventh-day Adventist church in Monterey County other than the one previously located on 10th Street in Marina, which moved to California Street in Salinas last year.

Because it is the only such church ever located in Marina, and because it was located in Marina when Ronald created the Trust and remained there until after his death, Petitioner believes that Ronald intended to name the Monterey Korean Seventh-day Adventist Church as a beneficiary; accordingly, Petitioner seeks an instruction that [the Monterey Korean Seventh-day Adventist Church] is a proper recipient of **15%** of the Trust assets.

Petitioner prays that:

1. The Court issue an instruction to Petitioner that the Monterey Peninsula Seventh-day Adventist Church located in Pacific Grove on Lighthouse Avenue is the beneficiary intended by Ronald, and that Petitioner may properly distribute **15%** of the available trust assets to that entity; and
2. The Court issue an instruction to Petitioner that the Monterey Korean Seventh-day Adventist Church located on California Street in Salinas is the beneficiary intended by Ronald and that Petitioner may properly distribute **15%** of the available trust assets to that entity.

DOD: 12/28/2012		<p>LYNETTE LOUISE BALLIS and CHERYL RYAN DIFFEY, daughters, are petitioners.</p> <p>40 days since DOD.</p> <p>No other proceedings.</p> <p>Decedent died intestate</p> <p>I & A - \$120,000.00</p> <p>Petitioners requests Court determination that Decedent's interest in real property passes to them pursuant to intestate succession.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail W/		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 5/30/13
			Updates: 6/3/13
			Recommendation: SUBMITTED
			File 5 - Clancy

DOD: 3/10/2013	ANDREW OCHOA, Jr. , son, is petitioner and requests appointment as Administrator without bond.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need name and date of death of deceased spouse. Local Rule 7.1.1D. 2. Need date of death of deceased son, David Ochoa. Local Rule 7.1.1D. 3. Need affidavit of Publication. 4. Need waivers of bond from Joe Ochoa (son), Ashley Ochoa Aguilar (granddaughter, issue of deceased son, David Ochoa) and David Ochoa, Jr. (issue of deceased son, David Ochoa) or bond set at \$152,000.00 <p>Note: Petitioner also filed to be appointed as Special Administrator. The minute order from the hearing on the appointment of a Special Administrator states the Court indicates to the parties that it intends to appoint the Public Administrator at the next hearing.</p>
Cont. from	Full IAEA - ??	
<input type="checkbox"/> Aff.Sub.Wit.	Decedent died intestate.	
<input checked="" type="checkbox"/> Verified		
Inventory	Residence: Fresno	
PTC	Publication: NEED	
Not.Cred.		
Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	Estimated value of the estate:	
Aff.Pub.	Real property - \$152,000.00	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Probate Referee: Steven Diebert	
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 5/30/13
		Updates:
		Recommendation:
		File 6 - Ochoa

Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 3/9/2013	MARIA GALLEGOS , surviving spouse, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. There does not appear to be a provision in the Probate Code that would allow an individual to assign or disclaim their right in a summary proceeding. Therefore all who succeed to the property must petition. If after all those entitled receive the property they can then transfer their interest in the property to the petitioner.
	40 days since DOD.	
Cont. from	No other proceedings	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	I & A - \$45,000.00	
Inventory	Decedent died intestate.	
PTC		
Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Petitioner requests Court determination that decedent's interest in real property located 5078 E. Platt in Fresno passes to her pursuant to intestate succession and assignments of interest from decedent's children.	
<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: KT
		Reviewed on: 5/30/13
		Updates: 6/3/2013
		Recommendation:
		File 7 - Gallegos

Age: 8/17/2012		<p>EDWARD SIMPSON, brother, is petitioner and requests appointment as Administrator.</p> <p>Petitioner was appointed special administrator for the sole purpose of speaking with the insurance company. Letters of Special Administration expire on 6/4/13.</p> <p>Full IAEA - ??</p> <p>Decedent died intestate.</p> <p>Residence: Reedley Publication: NEED</p> <p>Estimated value of the estate: Personal property - \$1,000,000.00</p> <p>Probate Referee: Rick Smith</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Petition does not address bond. The decedent sole heir is his minor son. Therefore, bond should be set at \$1,000,000.00. Need Affidavit of Publication. Need Notice of Petition to Administer the Estate. Need proof of service of the Notice of Petition to Administer the estate on: <ol style="list-style-type: none"> Karter Simpson, minor son The person or persons having legal custody of Karter Simpson. Need Letters 	
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			
<input type="checkbox"/>	Aff.Mail			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Aff.Pub.			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			<input checked="" type="checkbox"/>
<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: KT				
Reviewed on: 5/30/13				
Updates:				
Recommendation:				
File 8 – Simpson				

Age: 3 years	<u>TEMPORARY EXPIRES 6/4/2013</u>	NEEDS/PROBLEMS/COMMENTS:
	MANJIT SINGH , maternal aunt, is petitioner.	<p><u>This petition is as to GAGE only.</u></p> <p>1. Need proof of service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on:</p> <ul style="list-style-type: none"> a. Jesse Castellanos (paternal grandfather) b. Linda Beltran (paternal grandmother) c. Gurchhinder Paul Singh (maternal grandfather) d. Piari Singh (maternal grandmother)
	Father: JESSE CASTELLANOS, JR. – personally served on 4/4/2013.	
Cont. from	Mother: KAMALJIT SINGH – consents and waives notice.	
<input type="checkbox"/> Aff.Sub.Wit.	Paternal grandfather: Jesse Castellanos	
<input checked="" type="checkbox"/> Verified	Paternal grandmother: Linda Beltran	
<input type="checkbox"/> Inventory	Maternal grandfather: Gurchhinder Paul Singh	
<input type="checkbox"/> PTC	Maternal grandmother: Piari Singh	
<input type="checkbox"/> Not.Cred.	Petitioner states guardianship is necessary because the mother and father do not have a stable place to live. The father is on drugs. The child is exposed to domestic violence. The child is not cared for on both sides because all the parents want to do is get high.	
<input checked="" type="checkbox"/> Notice of Hrg	Court Investigator Julie Negrete's Report filed on 5/28/2013.	
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv.		
<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: KT
		Reviewed on: 5/30/13
		Updates:
		Recommendation:
		File 9 – Castellanos

Pro Per **Mesa, Martha Elena (Pro Per Petitioner, Guardian)**

Petition for Termination of Guardianship

Age: 14 years	MARTHA ELENA RIVERA de MESA , maternal aunt and Guardian appointed on 3/20/2012, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	Father: ANTONIO VIRAMONTES ; <i>deceased</i> .	
Aff.Sub.Wit.	Mother: EDITH ROSAURA RIVERA REYES ; <i>consents and waives notice</i> .	
Verified	X	
Inventory	<i>Minor consents and waives notice</i> .	
PTC		
Not.Cred.	Paternal grandfather: Unknown Paternal grandmother: Unknown Maternal grandfather: <i>Deceased</i> . Maternal grandmother: <i>Deceased</i> .	
Notice of Hrg	N/A	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	Petitioner states the child wishes to go back to Mexico, as she misses her family and is very sad and depressed. Petitioner states she decided to take the child to receive mental health services to help her with her stress and depression (<i>please refer to attached letter from the Department of Behavioral Health</i>), and the child has made progress in her treatment, but Petitioner can see that the child is not happy. Petitioner states she wants what is best for the child and for her to be happy, and she strongly believes that by going back to live with her mother she will be better.	
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
✓ CI Report	Court Investigator Samantha Henson's Report was filed on 5/28/2013.	
9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LEG
		Reviewed on: 5/30/13
		Updates:
		Recommendation:
		File 10 – Viramontes

Age: 2	NO TEMP REQUESTED	NEEDS/PROBLEMS/COMMENTS:
	JEANETTE ORTEGA, Maternal Grandmother, is Petitioner.	<u>Continued from 3-19-13</u>
Cont. from 031913	Father: DONNY BARNs - Declaration of Due Diligence filed 2-14-13	<u>Minute order 3-19-13: The Court on its own motion grants a temporary guardianship in favor of Jeanette Ortega. The temporary expires on 6/4/13. Ms. Ortega is ordered to attend AA and not to consume alcohol. In addition, Ms. Ortega is ordered to maintain contact with her sponsor and continue attending her church meetings. The Court orders Ms. Ortega to maintain proof of everything she is doing to become an appropriate guardian. The court investigator is ordered to conduct a follow-up investigation of Ms. Ortega before the next hearing. Continued to 6/4/13 @ 9:00 a.m. Dept. 303 Temporary extended to 6/4/13</u>
Aff.Sub.Wit.	Mother: VANITY SUAREZ - Personally served 1-22-13	
✓ Verified	Paternal Grandparents: Unknown	<u>As of 5-29-13, nothing further has been filed. The following issues remain:</u>
Inventory	- Declarations of Due Diligence filed 2-14-13	
PTC	Maternal Grandfather: Not listed	1. If diligence is not found, need proof of personal service of Notice of Hearing with a copy of the Petition at least 15 days prior to the hearing per Probate Code §1511 on: - Donny Barns (Father)
Not.Cred.		
✓ Notice of Hrg	Petitioner states her granddaughter needs guardianship because the mother has been on drugs and doesn't seem like she's going to stop any time soon and has Alyssa in dangerous situations.	<i>Note: Petitioner's Declaration of Due Diligence filed 2-14-13 states she doesn't know the father, only met him once, but does not indicate any diligence to locate him. According to the petition, he may be in jail. The Court may require further diligence.</i>
Aff.Mail X		
Aff.Pub.	Court Investigator Jo Ann Morris filed a report on 3-7-13.	2. Need proof of service of Notice of Hearing with a copy of the Petition at least 15 days prior to the hearing per Probate Code §1511 on: - Paternal Grandfather - Paternal Grandmother - Maternal Grandfather
Sp.Ntc.		
✓ Pers.Serv. W		<i>Note: Petitioner's Declaration of Due Diligence filed 2-14-13 states she doesn't know the paternal grandparents, she only met the father once, but does not indicate any diligence to locate them. Petitioner did not file a declaration of due diligence regarding the maternal grandfather.</i>
✓ Conf. Screen		
✓ Letters		Reviewed by: skc
✓ Duties/Supp		
Objections		Reviewed on: 5-29-13
Video Receipt		Updates:
✓ CI Report		Recommendation:
✓ Clearances		File 11- Barns
✓ Order		
Aff. Posting		
Status Rpt		
✓ UCCJEA		
Citation		
FTB Notice		

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

Age: 5 months	TEMPORARY EXPIRES 06/04/13	NEEDS/PROBLEMS/COMMENTS:
	CANDICE DODGE , maternal grandmother, and KATHY WEISMAN , maternal great-grandmother, are petitioners.	Note: Minute Order of 04/11/2013 states that the father objects however as of this Examiner
Cont. from	Father: PETER KENNEDY , personally served on 04/03/2013	
Aff.Sub.Wit.	Mother: DIANNA JEAN HENSON , consents and waives notice	
✓ Verified	Paternal grandparents: Deceased	
Inventory	Maternal grandfather: Deceased	
PTC	Petitioners allege that the mother has a serious drug addiction and mental health issues and has abandoned the child. The child was left with the presumed father, Peter Kennedy, and he has also abandoned the child. Mr. Kennedy is in violation of his felony probation. Petitioners state that guardianship it is in the child's best interest that they be appointed co-guardians.	
Not.Cred.	Court Investigator Charlotte Bien's report filed 05/28/2013.	
✓ Notice of Hrg		
Aff.Mail	n/a	
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: LV
		Reviewed on: 05/30/2013
		Updates:
		Recommendation:
		File 12 – Henson

<p>"Liz" (age 14)</p> <p>Aff.Sub.Wit.</p> <p>✓ Verified</p> <p>Inventory</p> <p>PTC</p> <p>Not.Cred.</p> <p>✓ Notice of Hrg</p> <p>✓ Aff.Mail</p> <p>Aff.Pub.</p> <p>Sp.Ntc.</p> <p>✓ Pers.Serv. W</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>Status Rpt</p> <p>✓ UCCJEA</p> <p>Citation</p> <p>FTB Notice</p>	<p>TEMP GRANTED EX PARTE EXPIRES 6-4-13</p> <p>GENERAL HEARING 7-24-13</p> <p>BARBARA HUNGERFORD, Paternal Grandmother, and BRENDA EPPERSON, Sister, are Petitioners.</p> <p>Father: WILLIAM DAWSON - Deceased</p> <p>Mother: DEBORAH DAWSON - Personally served 5-24-13</p> <p>Paternal Grandfather: William Dawson Maternal Grandfather: Deceased Maternal Grandmother: Deceased</p> <p>Additional sibling: Zachary Dawson</p> <p>Petitioners state Liz previously lived with her father and sister (petitioner Brenda) until he passed away suddenly on 5-4-13. Liz and Brenda have been residing with Petitioner Barbara Hungerford since then.</p> <p>Petitioners state Liz has learning disabilities and is in a special education program at Reyburn Intermediate School. Petitioners are not able to obtain information or change her bus schedule to her new residence without guardianship. Petitioners state the mother does not have a relationship with Liz and has not seen her for at least two years. The mother resides in Modesto in a rundown poorly-maintained home, and there are other individuals who live there who do not appear to be good influences for Liz. Petitioners state the mother is motivated by money. She receives assistance for Liz' brother Zachary, but he will turn 18 soon and Petitioners are afraid she will attempt to get custody of Liz, especially since Liz will now receive benefits from her father's social security.</p> <p>Petitioners state Liz needs to maintain stability due to her learning disabilities and wants to remain in the home with her sister. They agreed that Barbara and Brenda would seek co-guardianship to assist with health and education decisions, but the sisters plan on moving back into the residence they resided in with their father, and the family is cleaning and improving the home so they can live there.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Reviewed by: skc</p> <p>Reviewed on: 5-29-13</p> <p>Updates: 5-31-13</p> <p>Recommendation:</p> <p>File 1 – Dawson</p>
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