

<b>Age: 50 years</b>	<b>ARMENTA BURRIS</b> , sister, was appointed conservator on 8/17/2005.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>DOB: 2/6/1965</b>		
	Court Investigator Jennifer Young filed a Petition for Transfer on 11/25/14 to be heard on 01/15/15, requesting this proceeding be transferred to Tulare County because the conservatee has resided there for over five years.	<b>Note:</b> Conservator was formerly represented by Ruth Ratzlaff.
<b>Cont. from</b>	<b>No appearances</b> were made at the 01/15/15 hearing and the Court set the matter for an Order to Show Cause on 03/05/15 and ordered that Ruth Ratzlaff and Armenta Burris both be personally present.	<b>Note:</b> An Order After Hearing was submitted by Attorney Stanley Teixeira on 05/28/15. It is unclear whether the Trust Agreement attached to the Order After Hearing incorporates the changes discussed in the 03/12/12 transcripts. The Court may require specific information as to what changes were made (if any) and where they are found in the Trust Agreement.
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>	<b>On 03/05/15</b> , Attorney Ratzlaff did not appear and the Court ordered sanctions against her in the amount of \$1,000.00. <b>Minute order from 03/05/15</b> states, in relevant part: The Court notes that Ms. Ratzlaff has not prepared the order requested years ago and has not appeared. The Court will not transfer the case to Tulare County without verification that the money is still in the trust account. <b>Matter was continued to 04/30/15.</b>	
<b>Inventory</b>		
<b>PTC</b>	<b>On 04/30/15</b> , Stanley Teixeira appeared on behalf of Conservator Armenta Burris. <b>Minute Order from 04/30/15</b> states: Mr. Teixeira is to prepare the order. The Court orders that a copy of the reporter's transcript filed 11/09/10 be made for Mr. Teixeira. Ms. Burris is to contact the state bar to ascertain whether or not the funds remain in the trust account.	
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	Continued on Page 2	
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 06/03/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 1 - Lee</b>

**Status Report/Declaration of J. Stanley Teixeira** filed 05/29/15 states: at the hearing on 04/30/15, the Court ordered the preparation of an Order After Hearing incorporating matters from the Reporter's Transcript of a hearing occurring on 03/12/10. A copy of the transcript was obtained and a draft Order incorporating certain matters into the trust as suggested in the transcript. After preparing the draft Order, Master Trust of California was contacted to obtain a new and potentially updated "Joinder Agreement and Application for Admission with the Master Trust of California." Attorney Teixeira spoke with Robert G. Britton, the Trust Administrator/Trust Officer at Master Trust of California. He stated that since the hearing on 03/12/10, the Master Trust is using a new "court supervised trust document." He further informed that the following are required for Master Trust of California to be involved: A) venue for trust administration must be transferred to the San Bernardino Superior Court; B) approval of the fee schedule and approval to begin taking trustee fees upon funding; and C) approval of the investment of the funds according to the Investment Policy. He implied that these requirements are non-negotiable. **Copies of the new trust, fee schedule and investment policy attached.** The proposed Order After Hearing submitted is based on the foregoing.

At the same hearing on 04/30/15, the court ordered confirmation from the State Bar that certain funds continue to be held in the attorney-client trust account of attorney Ruth E. Ratzlaff. On 05/07/15, the State Bar was contacted and informed Mr. Teixeira that there is no way for the State Bar to verify the matter and suggested that inquiry be made directly with the attorney. On 05/13/15, a letter was sent to Ruth Ratzlaff via certified mail requesting verification that the funds continue to be held in her client trust account. On 05/18/15, a certified mail return receipt was received evidencing that the letter was received and signed for on 05/15/15. As of the date of declaration, no communication has been received from Ms. Ratzlaff about this matter. The amount that should be on deposit in Ms. Ratzlaff's client trust account is \$50,781.60. (\$54,793.10 less court approved reimbursements).

**Fourth Account and Report of Trustee; Petition for Approval Thereof; and for Award of Attorneys' Fees**

	<b>CAROLYN BATES-WELCH</b> , Trustee, is petitioner.		<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Please see page 2B</b>  1. Declaration of Attorney, Julie Casey re: attorney fee request is not signed or verified.  2. Declaration of Attorney Julie Casey re attorney fee request does not include Attachment "A" – billing statement.  3. Order does not comply with Local Rule 7.6.1C – All orders settling accounts must contain a statement as to the balance of the estate on hand, specifically noting the amount of cash included in the balance.  <b>Note:</b> If the petition is granted, a status hearing will be set as follows:  • <b>Wednesday, February 22, 2017</b> at 9:00 a.m. in Department 303, for the filing of the fifth 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.  <b>Reviewed by:</b> KT <b>Reviewed on:</b> 6/1/15 <b>Updates:</b> <b>Recommendation:</b> <b>File 2A- Welch</b>
	Account period: 1/1/13 – 12/31/14		
	Accounting	- \$1,307,214.26	
	Beginning POH	- \$1,206,207.61	
	Ending POH	- \$1,147,049.86	
	(\$18,283.58 is cash)		
	<b>Current bond is \$250,000.00.</b>		
	<b>Petition states</b> the Petitioner (Cynthia's mother, who is a registered nurse) was paid \$57,600 (\$2,400.00 per month) as caregiver expenses. This amount was approved by the court in 2007.		
	Attorney fees (Lang, Richert & Patch) - \$3,550.00 (per itemization and declaration, 33.20 hours at @ \$130.00 - \$250.00 per hour)		
	<b>Petition states</b> during this account period, Lang, Richert & Patch contracted with Julie Casey as an independent attorney to assist in the preparation of the accounting.		
	Attorney fees (Julie Casey) - \$2,227.50		
	Costs	- \$400.00 (filing fees)	
	<b>Please see additional page</b>		
Cont. from			
✓ Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail	W/		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
✓ 2620(c)			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

**Petition states** the beginning property on hand does not correspond to the ending property on hand from the prior accounting. The prior three accountings mistakenly included the annuity held with Canada Life Insurance Company of America at its approximate market value based on the remainder to be paid out from the annuity. As such, the total property on hand at the end of the last account provided for incalculable and unrealized gains. That issue has been corrected in this accounting to reflect the annuity as a non-cash item reported at its carry value.

**Petitioner prays for an Order:**

1. Confirming, ratifying, and approving all acts and transactions of Petitioner as reported herein;
2. Approving Petitioner's 4<sup>th</sup> Account and Report as presented;
3. Reaffirming the compensation paid to the caregiver, Carolyn Bates-Welch) in the amount of \$2,400.00 per month;
4. Allowing the sum of \$3,950.00 in attorneys' fees and costs for Lang, Richert & Patch;
5. Allowing the sum of \$\$2,227.50 in attorney's fees to Julie Casey;
6. Allowing a decrease in the bond amount from \$250,000.00 to \$192,000.00;
7. Requiring the next accounting of the Trustee be for the period of 1/1/2015 through 12/31/2016.

Application to Decrease the Bond Amount of the Cynthia Welch Special Needs Trust.

		<p><b>CAROLYN BATES-WELCH</b>, Trustee, is petitioner.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Petition was not verified. Probate Code §1020.</p>
		<p><b>Petitioner states</b> as previously found by the court the bond does not need to include the carry value of the Canada Life Insurance of America Annuity (\$1,075,000.00).</p>	
<b>Cont. from</b>		<p>Property on hand, income for one year and the cost of recovery pursuant to Probate Code §2320 is \$191,454.85.</p>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input type="checkbox"/>	<b>Verified</b>	X	
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		<p>Currently the bond is set at \$250,000.00. Petitioner seeks to decrease the bond amount to \$192,000.00.</p>
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		<p><b>Wherefore, Petitioner requests that:</b></p> <p>1. The Court order a new bond in the amount of \$192,000.00 to be filed for the Trust.</p>
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W/	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>	X	<p><b>Reviewed by:</b> KT</p> <p><b>Reviewed on:</b> 6/1/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p>File 2B - Welch</p>
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		

<b>DOD: 07/19/96</b>	<p><b>MINNIE MAYFIELD-JOHNSON</b>, daughter, was appointed as Administrator with limited IAEA authority and without bond on 02/28/06.</p> <p>Letters of Administration were issued on 02/28/06.</p> <p>Inventory &amp; Appraisal, final, filed 11/23/05 - \$40,000.00</p> <p>Inventory &amp; Appraisal, Reappraisal for Sale, filed 04/05/07 - \$160,000.00</p> <p>Order for Settlement of the First Account was filed on 05/08/2014.</p> <p>Minute Order of 05/08/2014 set this matter for the Filing of the Final Account and Petition for Distribution.</p> <p><b>Status Report filed 06/01/2015</b> states the estate remains open with assets consisting of the real property located at 727 Pottle Avenue, Fresno, with current value estimated at approximately \$50,000.00. Since the last status hearing, the estate has offered to sell the property to Wanda Smith being a beneficiary of the estate and current occupant of the property for \$50,000.00. The Administrator has engaged the services of Teresa Norman, Realtor with Modern Realty to list the property for sale prior to the hearing date if there is no agreement to sell the property to Wanda Smith, prior to that date.</p>	<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <p><b>Minute Order of 03/05/2015: The Court will not allow the estate to continue to remain open. Matter is continued to 06/04/2015. The Court will expect to hear at the next hearing whether the property has been listed, and whether there have been any other offers.</b></p> <p>1. Need Final Account and Petition for Final Distribution.</p>
<b>Cont. from 090414, 030515</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: LV</b>
		<b>Reviewed on: 06/02/2015</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 3 - Mayfield</b>

**4 Loretta M. Drummond (Estate)**

**Case No. 11CEPR00689**

**Atty Neilson, Bruce A. (for Janette Courtney – Executor – Petitioner)**  
**Atty Dawson, Joanne E. (Pro Per – Beneficiary – Objector)**

(1) First and Final Account and Report of Executor and Petition for Its Settlement,  
 (2) for Allowance to Executor and Attorneys for Compensation for Ordinary and Extraordinary  
 Services and for (3) Final Distribution

<b>DOD: 6-9-11</b>		See petition and objections for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  Continued from 2/25/15, 2/26/15, 5/7/15  Note: Objections were filed 3/23/15. Responses to Objections were filed 4/9/15. On 5/28/15, Joanne E. Dawson filed Reply of Respondents/Objectors to Janette Courtney's Declaration in Response to Objections. See following pages.  Note: Order of Preliminary Distribution entered 2-27-15 distributes the Mariposa real property to Steven Thomas pursuant to the Decedent's will.  <p style="text-align: center;"><u>SEE PAGE 2</u></p>	
<b>Cont from 022515, 022615, 050715</b>				
	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>			
✓	<b>Inventory</b>			
✓	<b>PTC</b>			
✓	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>			
✓	<b>Aff.Mail</b>			W
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
✓	<b>Letters</b>			9-15-11
	<b>Duties/Supp</b>			
✓	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
✓	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
✓	<b>FTB Notice</b>			
				<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 6/2/15		
		<b>Updates:</b>		
		<b>Recommendation:</b>		
		<b>File 4 - Drummond</b>		

**NEEDS/PROBLEMS/COMMENTS:** The following remain noted for reference.

1. **Petitioner paid extraordinary fees totaling \$62,049.28 to Attorney Scott Ivy in connection with the litigation against the estate, and requests reimbursement. The Court may require clarification with reference to Cal. Rules of Court 7.700.**

**Note:** Exhibit B, Attorney Declaration Re Compensation, describes the benefit to the estate, and provides itemization in the form of billing statements for services in connection with the Petition to Determine Validity of Trust Instruments filed 12-19-11 in this matter and the related civil action, 11CECG04320. The declaration states the litigation was successfully settled to the benefit of the estate, as the Drummond Company agreed not to seek collection of outstanding loans owing by the decedent, saving the estate in excess of \$200,000.00. The litigation had stalled the sale of the Visalia property owned by the estate, and by the settlement, the complaining party agreed not to object to the sale, opening the way for the sale to provide funds to the estate. The parties agreed that the settlement would not impair or impede Petitioner's right to petition the probate court for reimbursement of her attorney's fees and costs incurred in the litigation. Petitioner paid for the defense from her own funds, for reasonable attorney's fees for extraordinary services, and should be reimbursed for \$62,049.28.

**Update: Please note discussion re this amount in the Objection and Response.**

2. **Many of the expenses charged include expenses considered by this Court to be costs of doing business and not reimbursable, such as charges for photocopies, computer research fees, clerical services, travel/telephonic appearance costs, and runner/document services. The Court may disallow these charges. (Examiner calculates a total of \$1,251.86 in non-reimbursable expenses.)**
3. **The total cost also includes \$3,867.82 in interest charged on the various billing statements. The Court may require clarification or authority for interest charges on extraordinary fees not yet authorized by the Court.**

**Declaration Re Attorney Fee Reimbursement filed 2-24-15 states** the examiner notes expressed that the Court may require clarification of the attorney fee reimbursement in light of CA Rule of Court 7.700. Mr. Neilson submits the following in response: The rule of court cited is to prohibit payment from estate assets prior to court authorization. In this case, no estate assets were used to pay the litigation attorney fees at issue; they were paid from the petitioner's own assets. Reimbursement is now sought to obtain court approval of reimbursement. This procedure was contemplated by the settlement of the litigation, which settlement agreement, approved by this Court (Judge Oliver), provided that the settlement agreement will not impair or impede Janette's right to petition the probate court for reimbursement of some or all of her attorney's fees and costs incurred in the litigation from the estate (attached). Petitioner is following that contemplated procedure and is now seeking the Court's approval.

**Status Hearing Re: Filing of the Second Account**

<b>Age: 97</b>	<p><b>DIANE FRATIS</b>, daughter, was appointed as Conservator of the Person and Estate with bond set at \$209,000.00 on 02/17/12. Letters were issued on 03/06/12.</p> <p><b>Conservator's First Account</b> was approved on 05/22/13. Minute Order from 05/22/13 set this matter for a status hearing regarding filing of the Second Account.</p> <p><b>Status Report filed 04/14/15 states:</b>          Conservator was previously represented by Gary Motsenbocker who passed away on 02/19/15. Conservator's new attorney, Dean Hiyama, is in the process of purchasing Mr. Motsenbocker's business and has substituted in as attorney of record for the conservator. Mr. Hiyama's office is now in receipt of all documents necessary to prepare and file the second account, covering the period beginning March 1, 2013 through April 1, 2015. It is anticipated that the second account will be filed within the next 30-45 days and a continuance is requested.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><u>CONTINUED FROM 04/17/15</u></b></p> <p>1. Need Second Account current.</p>
<b>Cont. from 041715</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: JF</b>
		<b>Reviewed on: 06/01/15</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 5 - Fratis</b>

<b>DOD: 07/04/12</b>	<b>WILLIAM MARTIN (MARTY) SHIBA</b> , son, was appointed Executor with full IAEA and without bond on 03/28/13. Letters Testamentary were issued on 03/29/13.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from 053014, 063014, 073014, 091714, 011515, 022615, 042315</b>	Inventory & Appraisal, final filed 07/15/13 - \$68,775.68	<b>CONTINUED FROM 04/23/15</b> <b>As of 06/01/15, nothing further has been filed.</b>
<b>Aff.Sub.Wit.</b>	<p><b>Status Report</b> filed 07/28/14 states: The office is currently in the process of preparing the petition and first account current in this matter. There is a Medi-Cal claim filed against the estate as well as a trust for this estate that is also considered in the estate plan. The executor and his attorney are currently in the process of completing negotiations and settlement of a dispute regarding the Medi-Cal claim. It is requested that this status hearing be continued for 45 days to allow time for the executor and his attorney to complete negotiations on the claim and to file the first account and report reflecting said negotiation and settlement.</p> <p><b>Status Report</b> filed 04/22/15 states: the Executor's attorney, Gary Molsenbocker, passed away on 02/19/15. Dean Hiyama (Declarant) is in the process of purchasing Mr. Molsenbocker's business. A Substitution of Attorney is currently being obtained. Their office is in receipt of all documentation necessary to prepare and file the first and final account and anticipates that it will be filed within the next 30-45 days. A 45 day continuance is requested.</p>	<ol style="list-style-type: none"> <li>1. Need First Account/Report of Executor and Petition for Final Distribution and/or current written status report.</li> </ol>
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 06/01/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 6 - Shiba</b>

Atty Joy, Maurice E. (for Administrator Staci Ann Ragan)

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

DOD: 7/27/2013		
	<p><b>STACI ANN RAGAN</b>, daughter, was appointed Administrator with Full IAEA authority without bond on 11/20/2013.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
Cont. from 042315	<p><b>Amended Letters issued on 1/16/2014.</b></p>	<p><b>Continued from 4/23/15.</b> Minute Order states no appearance is required on 6/4/15 if the petition is filed by 6/2/15, however, if the petition is not filed then a verified Status Report is to be filed by 6/2/15 and Staci Ragan is ordered to be personally present.</p>
Aff.Sub.Wit.	<p><b>Pursuant to Probate Code § 8800(b)</b>, Final Inventory and Appraisal was filed 6/2/2014 showing an estate value of <b>\$764,265.07</b>.</p>	
Verified	<p><b>Pursuant to Probate Code § 12200</b>, first account and/or petition for final distribution was due 1/16/2015.</p>	
Inventory	<p><b>Minute Order dated 11/20/2013</b> set this status hearing for filing of the first account and/or petition for final distribution.</p>	
PTC		
Not.Cred.	<p><b>Status Report of Stacie Ann Ragan filed 1/12/2015 for previous status hearing states:</b></p>	
Notice of Hrg	<ul style="list-style-type: none"> <li>Declarant has not completed all duties required of her with respect to administration of the estate in that the escrow was opened for the sale of real property owned by the estate;</li> </ul>	<ol style="list-style-type: none"> <li>Need first and final account, or verified status report and proof of service of notice of the status hearing pursuant to Local Rule 7.5(B).</li> </ol>
Aff.Mail	W/	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections	<ul style="list-style-type: none"> <li>Notice of Proposed Action was served on all persons affected by the sale but the escrow is contingent upon the obtainment of a lot line adjustment, and this has caused a delay in the close of escrow;</li> </ul>	
Video Receipt	<ul style="list-style-type: none"> <li>A deed adjusting the lot line has been signed very recently and it is anticipated that upon the recording of the deed, the escrow will close shortly thereafter;</li> </ul>	
CI Report	<ul style="list-style-type: none"> <li>Declarant will then be in a position to file a Petition for Final Distribution of the estate with the Court.</li> </ul>	
9202		
Order		
Aff. Posting		
Status Rpt		<p><b>Reviewed by:</b> LEG</p>
UCCJEA		<p><b>Reviewed on:</b> 6/2/15 (by KT for 6/4/15 hearing)</p>
Citation		<p><b>Updates:</b></p>
FTB Notice		<p><b>Recommendation:</b></p>
		<p><b>File 7 - Hamlin</b></p>

<b>DOD: 10-10-13</b>	<p><b>TINA HENSON</b>, Daughter, was appointed Administrator with Will Annexed with Full IAEA without bond on 1-7-14. Letters issued 1-9-14.</p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>Continued from 3-6-15</b>	
<b>Cont from 030615</b>	At hearing on 1-7-14, the Court set this status hearing for the filing of the first account or petition for final distribution.	<ol style="list-style-type: none"> <li><b>1. Need first account or petition for final distribution pursuant to Probate Code §12200.</b></li> <li><b>2. On 12-17-13, the Court ordered that the original will be lodged with the Court. However, Court records do not indicate that the original will was ever lodged pursuant to the Court's order.</b></li> </ol>	
<b>Aff.Sub.Wit.</b>	<p><b>Declaration of Randolph Krbechek filed 3-5-15 states</b> he is working on the first and final report of the personal representative, but needs additional time to complete the schedules and finalize the pleading. Attorney Krbechek requests 30 days.</p>	<p><b>Note:</b> I&amp;A filed 3-4-14 indicates a total estate value of \$303,000.00 including real and personal property.</p> <p><b>Note:</b> The holographic will does not appear to dispose of all estate assets, so it appears the residue would pass pursuant to intestate succession. Intestate heirs include the decedent's four daughters.</p> <p><b>Note:</b> Three Creditor's Claims have been filed totaling \$41,158.33, and the Administrator rejected an additional claim for \$11,930.00. This brings total claims to \$53,088.33 at this time.</p>	
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			Reviewed by: skc
<b>Status Rpt</b>			Reviewed on: 6-2-15
<b>UCCJEA</b>	Updates:		
<b>Citation</b>	Recommendation:		
<b>FTB Notice</b>	File 8 - Henson		

Pro Per Velasquez, Guadalupe (Pro Per Petitioner, mother)

Pro Per Velasquez, Trinidad (Pro Per Petitioner, maternal grandmother)

**Petition for Visitation**

		<b>GUADALUPE VELASQUEZ</b> , mother, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note:</b> <i>Petition for Termination of Guardianship</i> filed 10/2/2014 by Petitioner Guadalupe Velasquez was denied on 1/26/2015.</p>
		<b>TRINIDAD VELASQUEZ</b> , maternal grandmother, was appointed Guardian on 4/7/2014. <i>Personally served on 4/13/2015.</i>	
<b>Cont. from 120814, 031215, 042315</b>			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W/	
	Conf. Screen		
	Letters		
	Duties/Supp		
✓	Objections	W/ POS	
	Video Receipt		
	CI Report		
	Clearances		
	Order	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			<p><b>Objection to Petition</b> filed by <b>TRINIDAD VELASQUEZ</b>, Guardian, on 4/17/2015.</p> <p><b>Declaration of Petitioner/Mother, GUADALUPE VELASQUEZ</b>, filed on 6/1/15</p>
			<p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 6/2/15 (by KT for 6/4/15 hearing)</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 9 - Velasquez</b></p>

<b>DOD: 02/17/14</b>	<b>SANDRA GONZALEZ</b> , Executor, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. The petition proposes to distribute real property in undivided interests. Pursuant to Local Rule 7.12.4A - The court will not order distribution of real property in undivided interests absent the written consent of all distributees. Need consent from distributees.</p>
	Accounting is waived.	
<b>Cont. from</b>	I & A - <b>\$649,134.40</b>	
<b>Aff.Sub.Wit.</b>	POH - <b>\$649,076.31</b> (\$45,576.31 is cash)	
✓ <b>Verified</b>	Executor - <b>waived</b>	
✓ <b>Inventory</b>	Attorney (statutory) - <b>\$15,982.69</b>	
✓ <b>PTC</b>	Closing - <b>\$2,000.00</b>	
✓ <b>Not.Cred.</b>	Petitioner states that taxes are due and will be paid from the property on hand as follows: Federal income taxes - \$11,704.00 State income taxes - \$3,912.00	
✓ <b>Notice of Hrg</b>	<b>Distribution, pursuant to decedent's will, is to:</b>	
✓ <b>Aff.Mail</b> w/	<b>Maria Gonzalez</b> - \$3,992.54 cash, plus 1/3 interest in 5 parcels of real property and 1/3 interest in 2 vehicles	
<b>Aff.Pub.</b>	<b>Sandra Gonzalez</b> - \$3,992.54 cash, plus 1/3 interest in 5 parcels of real property and 1/3 interest in 2 vehicles	
<b>Sp.Ntc.</b>	<b>George Gonzalez</b> - \$3,992.54 cash, plus 1/3 interest in 5 parcels of real property and 1/3 interest in 2 vehicles	
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b> 07/14/14		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
✓ <b>9202</b>		
✓ <b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
✓ <b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 06/01/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 10 - Gonzalez</b>

<b>DOD: 07/21/14</b>	<b>KATHLEEN ANN LYNN</b> , Executor, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Beneficiary Kenneth Ball has disclaimed his interest in the estate. Disclaimers have the effect as if the person disclaiming interest had predeceased the decedent. Petition does not state whether Kenneth Ball has issue. Need more information.</p>	
	Account period: <b>07/21/14 – 04/15/15</b>		
<b>Cont. from</b>	Accounting: <b>\$165,547.13</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Beginning POH: <b>\$165,000.00</b>		
<input checked="" type="checkbox"/> <b>Verified</b>	Ending POH: <b>\$45,829.24</b> (all cash)		
<input checked="" type="checkbox"/> <b>Inventory</b>	Executor: <b>waived</b>		
<input checked="" type="checkbox"/> <b>PTC</b>	Executor reimbursement:		
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	<b>\$4,636.21</b> (for payment of expenses of estate real property and payment of decedent's final bills)		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Attorney: <b>\$5,050.00</b> (statutory)		
<input checked="" type="checkbox"/> <b>Aff.Mail</b> w/	Closing: <b>\$1,000.00</b>		
<b>Aff.Pub.</b>	<b>Distribution, pursuant to decedent's will, is to:</b>		
<b>Sp.Ntc.</b>	<b>Kathleen Ann Lynn - \$7,028.60</b>		
<b>Pers.Serv.</b>	<b>Diane Sharp - \$7,028.60</b>		
<b>Conf. Screen</b>	<b>Karen Gorham - \$7,028.60</b>		
<b>Letters</b> 12/12/14	<b>Denise Frost - \$7,028.60</b>		
<b>Duties/Supp</b>	<b>Donna Gable - \$7,028.60</b>		
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<input checked="" type="checkbox"/> <b>9202</b>			
<input checked="" type="checkbox"/> <b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<input checked="" type="checkbox"/> <b>FTB Notice</b>			
			<b>Reviewed by:</b> JF
			<b>Reviewed on:</b> 06/01/15
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 11 – Ball</b>	

<b>Age: 5</b>	DILILA AGANZA, mother, was appointed Guardian of the Estate on 04/23/15 with bond set at \$100,980.00.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>Minute Order from 04/23/15</b> set this hearing for status regarding filing of the bond.	1. Need bond in the amount of \$100,980.00.
<b>Cont. from</b>		<b>Note:</b> The Order Appointing Guardian of the Minor has not been submitted after the hearing for signing and Letters have not issued.
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>		
<input type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 06/01/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 13 - Gonzalez</b>

Petitioner **Mendoza, Isaias (pro per – paternal cousin)**

Petitioner **Cantor, Misaela (pro per – paternal cousin)**

**Petition - Appoint Guardian of the Person**

<b>Age: 3 mos.</b>	<b><u>TEMPORARY EXPIRES 06/04/15</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>ISAIAS MENDOZA and MISAELA CANTOR,</b> paternal cousins, are Petitioners.	<b>Petitioners are Spanish speaking.</b>
	Father: <b>HILDEBERTO DE LA CRUZ –</b> <i>Consent &amp; Waiver of Notice filed 04/01/15</i>	1. 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 Appointment of Guardian of the Person</i> <u>or</u> <i>Consent &amp; Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for:
<b>Cont. from</b>	Mother: <b>CHHORVIN PECH –</b> <i>Consent &amp; Waiver of Notice filed 04/01/15</i>	a. Veth My (maternal grandmother)
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Paternal grandfather: <b>JOSE DE LA CRUZ-</b> <i>served by mail on 04/03/15</i>	
<input checked="" type="checkbox"/> <b>Verified</b>	Paternal grandmother: <b>LEODEGARIA</b> <b>AGRIPINO –</b> <i>served by mail on 04/03/15</i>	
<input type="checkbox"/> <b>Inventory</b>	Maternal grandfather: <b>YOEUP PECH –</b> <i>served by mail on 04/03/15</i>	
<input type="checkbox"/> <b>PTC</b>	Maternal grandmother: <b>VETH MY</b>	
<input type="checkbox"/> <b>Not.Cred.</b>	<b>Petitioners state</b> [see Petition for details].	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	<b>Court Investigator Dina Calvillo filed a</b> <b>report on 04/27/15.</b>	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> w/		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b> n/a		
<input checked="" type="checkbox"/> <b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>		
<input checked="" type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input checked="" type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input checked="" type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 06/02/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 14 – De La Cruz</b>

**15 Samuel Rosiles, Jr. & Jaquelyn Rosiles (GUARD/P) Case No. 15CEPR00343**

Petitioner Rosiles, Caroline (pro per – paternal grandmother)  
 Petition - Appoint Guardian of the Person

Samuel, 3	<b>TEMPORARY EXPIRES: 06/04/15</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
Jaquelyn, 2	<b>CAROLINE ROSILES</b> , paternal grandmother, is Petitioner.	
	Father: <b>SAMUEL ROSILES</b> – deceased	
	Mother: <b>CECILIA BENITEZ</b> – Consent & Waiver of Notice filed 05/05/15	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory	Paternal grandfather: GABRIEL ROSILES, SR. – deceased	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Maternal grandfather: REFUGIO BENITEZ – Consent & Waiver of Notice filed 04/13/15	
<input type="checkbox"/> Notice of Hrg	n/a Maternal grandmother: MARIA GOMEZ – Consent & Waiver of Notice filed 04/13/15	
<input type="checkbox"/> Aff.Mail	n/a	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.	<b>Petitioner states:</b> [see Petition for details].	
<input type="checkbox"/> Pers.Serv.	n/a <b>Court Investigator Julie Negrete filed a report on 04/27/15.</b>	
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 06/02/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 15 - Rosiles</b>

**Petition for Appointment of Successor Trustee**

	<p><b>BARBARA HOBE WINGFIELD</b>, beneficiary, is petitioner.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>			
<p>Cont. from</p>	<p>Petitioner states the <b>BERNICE G. HOBE TESTAMENTARY TRUST</b>, was created under the Last Will and Testament of Bernice G. Hobe.</p>				
<table border="1"> <tr> <td data-bbox="50 464 107 506"></td> <td data-bbox="107 464 310 506"><b>Aff.Sub.Wit.</b></td> <td data-bbox="310 464 380 506"></td> </tr> </table>		<b>Aff.Sub.Wit.</b>		<p>The trust came into existence pursuant to Order Settling the First and Final Account and Report of Executor dated 12/17/85.</p>	
	<b>Aff.Sub.Wit.</b>				
<table border="1"> <tr> <td data-bbox="50 506 107 548">✓</td> <td data-bbox="107 506 310 548"><b>Verified</b></td> <td data-bbox="310 506 380 548"></td> </tr> </table>	✓	<b>Verified</b>		<p><b>CARL HOBE</b> was appointed trustee of the Trust.</p>	
✓	<b>Verified</b>				
<table border="1"> <tr> <td data-bbox="50 548 107 590"></td> <td data-bbox="107 548 310 590"><b>Inventory</b></td> <td data-bbox="310 548 380 590"></td> </tr> </table>		<b>Inventory</b>		<p>Carl Hobe died in August 1992.</p>	
	<b>Inventory</b>				
<table border="1"> <tr> <td data-bbox="50 590 107 632"></td> <td data-bbox="107 590 310 632"><b>PTC</b></td> <td data-bbox="310 590 380 632"></td> </tr> </table>		<b>PTC</b>		<p>On 10/23/92, <b>MATT CHARLES HOBE</b> was appointed successor trustee of the Trust, and has been the acting Trustee of the Trust.</p>	
	<b>PTC</b>				
<table border="1"> <tr> <td data-bbox="50 632 107 674"></td> <td data-bbox="107 632 310 674"><b>Not.Cred.</b></td> <td data-bbox="310 632 380 674"></td> </tr> </table>		<b>Not.Cred.</b>		<p>On 2/16/15, Matt Charles Hobe suffered a stroke. Matt Charles Hobe is no longer fit to act as trustee of the Trust.</p>	
	<b>Not.Cred.</b>				
<table border="1"> <tr> <td data-bbox="50 674 107 716">✓</td> <td data-bbox="107 674 310 716"><b>Notice of Hrg</b></td> <td data-bbox="310 674 380 716"></td> </tr> </table>	✓	<b>Notice of Hrg</b>		<p>On 2/24/15, Matt Charles Hobe resigned as trustee of the Trust and nominated Barbara Hobe Wingfield as successor trustee of the Trust without bond.</p>	
✓	<b>Notice of Hrg</b>				
<table border="1"> <tr> <td data-bbox="50 716 107 758">✓</td> <td data-bbox="107 716 310 758"><b>Aff.Mail</b></td> <td data-bbox="310 716 380 758">W/</td> </tr> </table>	✓	<b>Aff.Mail</b>	W/	<p>Beneficiaries, Mark Hobe and Steven Hobe, nominate petitioner as successor trustee of the Trust without bond.</p>	
✓	<b>Aff.Mail</b>	W/			
<table border="1"> <tr> <td data-bbox="50 758 107 800"></td> <td data-bbox="107 758 310 800"><b>Aff.Pub.</b></td> <td data-bbox="310 758 380 800"></td> </tr> </table>		<b>Aff.Pub.</b>		<p>Petitioner requests she be appointed to serve as successor trustee without bond.</p>	
	<b>Aff.Pub.</b>				
<table border="1"> <tr> <td data-bbox="50 800 107 842"></td> <td data-bbox="107 800 310 842"><b>Sp.Ntc.</b></td> <td data-bbox="310 800 380 842"></td> </tr> </table>		<b>Sp.Ntc.</b>		<p><b>Declaration of Petitioner states</b> that for reasons unknown to her, the Bernice G. Hobe Trust has over the years been synonymously referred to as the Carl H. Hobe Revocable Trust. Consequently, Petitioner requests that the order reflect that she is appointed as successor trustee of the "trust created under the Last Will and Testament of Bernice G. Hobe, which came into existence by virtue of the Las Will and Testament of Bernice G. Hobe dated 2/16/84, sometimes referred to as the Carl H. Hobe Revocable Trust."</p>	
	<b>Sp.Ntc.</b>				
<table border="1"> <tr> <td data-bbox="50 842 107 884"></td> <td data-bbox="107 842 310 884"><b>Pers.Serv.</b></td> <td data-bbox="310 842 380 884"></td> </tr> </table>		<b>Pers.Serv.</b>		<p><b>Wherefore, Petitioner prays for an order as follows:</b></p>	
	<b>Pers.Serv.</b>				
<table border="1"> <tr> <td data-bbox="50 884 107 926"></td> <td data-bbox="107 884 310 926"><b>Conf. Screen</b></td> <td data-bbox="310 884 380 926"></td> </tr> </table>		<b>Conf. Screen</b>		<p>1. Appointing Barbara Hobe Wingfield as successor trustee of the Trust.</p>	
	<b>Conf. Screen</b>				
<table border="1"> <tr> <td data-bbox="50 926 107 968"></td> <td data-bbox="107 926 310 968"><b>Letters</b></td> <td data-bbox="310 926 380 968"></td> </tr> </table>		<b>Letters</b>			
	<b>Letters</b>				
<table border="1"> <tr> <td data-bbox="50 968 107 1010"></td> <td data-bbox="107 968 310 1010"><b>Duties/Supp</b></td> <td data-bbox="310 968 380 1010"></td> </tr> </table>		<b>Duties/Supp</b>			
	<b>Duties/Supp</b>				
<table border="1"> <tr> <td data-bbox="50 1010 107 1052"></td> <td data-bbox="107 1010 310 1052"><b>Objections</b></td> <td data-bbox="310 1010 380 1052"></td> </tr> </table>		<b>Objections</b>			
	<b>Objections</b>				
<table border="1"> <tr> <td data-bbox="50 1052 107 1094"></td> <td data-bbox="107 1052 310 1094"><b>Video Receipt</b></td> <td data-bbox="310 1052 380 1094"></td> </tr> </table>		<b>Video Receipt</b>			
	<b>Video Receipt</b>				
<table border="1"> <tr> <td data-bbox="50 1094 107 1136"></td> <td data-bbox="107 1094 310 1136"><b>CI Report</b></td> <td data-bbox="310 1094 380 1136"></td> </tr> </table>		<b>CI Report</b>			
	<b>CI Report</b>				
<table border="1"> <tr> <td data-bbox="50 1136 107 1178"></td> <td data-bbox="107 1136 310 1178"><b>9202</b></td> <td data-bbox="310 1136 380 1178"></td> </tr> </table>		<b>9202</b>			
	<b>9202</b>				
<table border="1"> <tr> <td data-bbox="50 1178 107 1220">✓</td> <td data-bbox="107 1178 310 1220"><b>Order</b></td> <td data-bbox="310 1178 380 1220"></td> </tr> </table>	✓	<b>Order</b>			
✓	<b>Order</b>				
<table border="1"> <tr> <td data-bbox="50 1220 107 1262"></td> <td data-bbox="107 1220 310 1262"><b>Aff. Posting</b></td> <td data-bbox="310 1220 380 1262"></td> </tr> </table>		<b>Aff. Posting</b>			
	<b>Aff. Posting</b>				
<table border="1"> <tr> <td data-bbox="50 1262 107 1304"></td> <td data-bbox="107 1262 310 1304"><b>Status Rpt</b></td> <td data-bbox="310 1262 380 1304"></td> </tr> </table>		<b>Status Rpt</b>			
	<b>Status Rpt</b>				
<table border="1"> <tr> <td data-bbox="50 1304 107 1346"></td> <td data-bbox="107 1304 310 1346"><b>UCCJEA</b></td> <td data-bbox="310 1304 380 1346"></td> </tr> </table>		<b>UCCJEA</b>			
	<b>UCCJEA</b>				
<table border="1"> <tr> <td data-bbox="50 1346 107 1388"></td> <td data-bbox="107 1346 310 1388"><b>Citation</b></td> <td data-bbox="310 1346 380 1388"></td> </tr> </table>		<b>Citation</b>			
	<b>Citation</b>				
<table border="1"> <tr> <td data-bbox="50 1388 107 1430"></td> <td data-bbox="107 1388 310 1430"><b>FTB Notice</b></td> <td data-bbox="310 1388 380 1430"></td> </tr> </table>		<b>FTB Notice</b>			
	<b>FTB Notice</b>				
		<p><b>Reviewed by: KT</b></p>			
		<p><b>Reviewed on: 6/2/15</b></p>			
		<p><b>Updates:</b></p>			
		<p><b>Recommendation:</b></p>			
		<p><b>File 16 - Hobe</b></p>			

**Petition for Appointment of Successor Trustee**

		<b>BARBARA HOBE WINGFIELD</b> , beneficiary, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Petitioner states the <b>MILFRED ARDELL HOBE TESTAMENTARY TRUST</b> , was created under the Last Will and Testament of Milfred Ardell Hobe.	
<b>Cont. from</b>		The trust came into existence pursuant to Order Settling the Fourth and Final Account and Report of Executor dated 10/2/75.	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	<b>CARL HOBE</b> was appointed trustee of the Trust.	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W/ Carl Hobe died in August 1992.	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>	On 7/7/08, <b>MATT CHARLES HOBE</b> was appointed successor trustee of the Trust, and has been the acting Trustee of the Trust.	
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>	On 2/16/15, Matt Charles Hobe suffered a stroke. Matt Charles Hobe is no longer fit to act as trustee of the Trust.	
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>	On 2/24/15, Matt Charles Hobe resigned as trustee of the Trust and nominated Barbara Hobe Wingfield as successor trustee of the Trust without bond.	
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>	Beneficiaries, Mark Hobe and Steven Hobe, nominate petitioner as successor trustee of the Trust without bond.	
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>	Petitioner requests she be appointed to serve as successor trustee without bond.	
<input type="checkbox"/>	<b>FTB Notice</b>	<b>Wherefore, Petitioner prays for an order as follows:</b>  2. Appointing Barbara Hobe Wingfield as successor trustee of the Trust.	
			<b>Reviewed by: KT</b>
			<b>Reviewed on: 6/2/15</b>
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 17 - Hobe</b>

Attorney Ladley, Candace K., and Martinez, Marla, for Petitioners)  
 Attorney Mele, James J. (for Trustee Ruth Aileen Bise – Objector)

**Petition for Suspension or Removal of Ruth Eileen Bise Rios as Trustee and Personal Representative, for Order Compelling Ruth Eileen Bise Rios to Turn over All of the Assets in Her Care, Possession, Custody and Control, & for Accounting to be Filed with the Court, and for Attorney's Fees, for Breach of Fiduciary Duty and Attorneys' Fees, for Tortious Interference with Right to Inherit, for Injunction & Removal from Residence, for Order Enjoining Trustee from Using Trust Assets to Defend Herself in this Action, for Conversion**

Julia G. Jones DOD: 2009		<b>RACHELLE RAE ROBLES RICO and JEREMY LELAND HERNANDEZ,</b> grandchildren and heirs of the decedent and beneficiaries of the trust, are Petitioners.	<b>NEEDS/PROBLEMS/COMMENTS:</b> 1. If Petitioners' Requests to Waive Court Fees are not granted, need \$435.00 filing fee for this petition. 2. The petition is incomplete (missing Pages 5 through 8) and all signatures are copies. The petition was not filed by fax. <u>Need complete, original petition.</u> 3. The title of the petition does not include the Probate Code section that allows the requested relief pursuant to Local Rule 7.1.1.C. Some of the relief requested may not be appropriate within this probate trust matter and may require civil or other litigation for the relief requested (e.g., tortious interference with right to inherit, removal from residence, inclusion of "Does 1-100," etc.) 4. The petition does not state the names and addresses of each person entitled to notice of the petition as required by Probate Code §17201. 5. Notice of Hearing filed 5/4/15 appears to indicate deficient service on some persons, including service by email. See Probate Code §1215. <u>Note:</u> Per #4 above, it is also unclear if all parties entitled to notice are included. 6. Probate Code §17200(b) provides that proceedings under this section may be filed if the requested information is not provided within 60 days after reasonable written request. Petitioners do not indicate whether written request was made for the information. It appears this petition filed in the Probate Court may be premature, given this section, and #3 above. 7. Petitioners request appointment of a successor trustee, but do not state a name and do not provide information regarding value of the trust for bond purposes.
Aff.Sub.Wit.		<b>Petitioners state</b> Settlor Julie G. Jones aka Jean Jones, Julia Burnett Green Jones and Julia B. Jones, died in 2009, a resident of Tuolumne County. The principal place of business of the trust is located in Fresno County. Successor trustee Kurt Arnold died in 2013, and upon his death, <b>RUTH EILEEN BISE RIOS</b> , a resident of Fresno County, became successor trustee and is presently acting as trustee. <b>Petitioners also include Does 1-100 as Respondents.</b>	
<input checked="" type="checkbox"/>	Verified	The trust provides at Article Five that the decedent's daughter, Mary Virginia Jones Padilla ("Ginna") shall have a life estate for the exclusive use of the lower level of the decedent's residence, which right shall terminate by sale of the residence, voluntary absence from the premises for an excess of 60 days, or by voluntary surrender. Petitioners state Ginna has been absent from the premises for over 60 days and recently died; therefore, her life estate has terminated.	
	Inventory	The trust provides that the upper level of the residence shall be held in trust for use by family members including Petitioners, Ruth, Ginna, and Kurt Arnold, subject to the discretion of the trustee, who is responsible for scheduling. The cost of maintaining the residence shall be paid from the Chevron stock dividends.	
	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		
	Order	x	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
<b><u>SEE ADDITIONAL PAGES</u></b>			
Reviewed by: skc			
Reviewed on: 6/2/15			
Updates:			
Recommendation:			
File 18C - Jones			

**Petitioners state (Continued):** Since Ruth became trustee, she has ousted all other family members from the residence and refuses to allow anyone except herself and her friends to use the decedent's residence, contrary to the terms of the trust, and is also using the balance of the trust assets to pay for the maintenance of the residence. Ruth has also failed and refused to provide the beneficiaries of the trust with any accountings or notice as required by Probate Code §16061.7.

Petitioners request the Court find that Ruth should be suspended or removed as successor trustee for the following reasons:

- a. Breach of trust §15642(b)(1)
- b. Unfit to administer trust §15642(b)(2)
- c. Other good cause §15642(b)(9)

The trust property and/or interests of the petitioners may suffer loss or injury pending a decision on a petition for removal of Ruth as trustee; therefore, Petitioners seek an order requiring her to surrender trust property to a receiver or temporary trustee and suspend powers pursuant to §15642(e).

Pursuant to §15642(c), Ruth should bear all costs of this proceeding, including Petitioners' reasonable attorney fees if the court finds that her designation as trustee was not consistent with the intent of the settlor or was the product of fraud, menace, duress, or undue influence.

Petitioners request the Court find that a constructive trust exists over any and all assets of the trust in Ruth's possession, order Ruth to turn over all assets to a trustee appointed by the court, order Ruth to account for any and all assets ever in her possession within 30 days.

Petitioners seek their attorney's fees from Ruth pursuant to Probate Code §17211(b).

***Petition is missing Pages 5 through 8. Page 9 continues the prayer that was apparently started on a prior missing page. Rather than summarize the incomplete prayer, Examiner's review will end here until the missing information is provided.***

**Note: The trust identifies the subject property as 13130 Wells Fargo Drive in Groveland, CA.**

**Ruth Aileen Bise Rios filed Opposition on 5/26/15**, along with a declaration in support of her opposition from Yvonne Marie Scott, a granddaughter of the decedent. Objector states the court should deny the petition and/or set the matter for trial because Objector has not committed a breach of the trust or breached her fiduciary duties, is experienced and qualified to continue to act as trustee (and as decedent's trusted choice), has rendered substantial and valuable services to the beneficiaries in maintaining the trust real property and other asset (Chevron stock), has not "ousted" or "refused" petitioners from using the real property, has not used "the balance" of trust assets for maintenance of the family residence, and has not failed and refused to provide the beneficiaries with an accounting. The trust provides for scheduling of use at the discretion of the trustee and states the discretion of the trustee is incontestable. When the Chevron stock dividends were insufficient for maintaining the residence, Ruth used her personal funds to do so. Sometimes she would reimburse herself. Often, she would forego reimbursement. Ruth has caused to be prepared and filed the fiduciary income tax returns for the trust. Ruth has personally take her half-brother, Petitioner Jeremy Leland Hernandez, to the family residence on several occasions, and Ruth's sister, Petitioner Rachelle Rae Robles Rico, has never asked to use the residence. Ruth has not used the balance of the trust assets – only the dividends have and are being used, together with Ruth's personal funds, when necessary. A full and complete accounting is attached as Exhibit B. See Opposition for further details, which appear to respond to sections of the petition missing from the original filing.

Note: Examiner has not reviewed the accounting at Exhibit B, as it has not been filed with the court for review; it is only provided as a response to the petition.

**19 Sandra J. McLane (Estate) Case No. 15CEPR00437**

**Attorney Wall, Jeffrey L (for Amanda K. McLane – Petitioner – Daughter)**

**Petition for Probate of Letters of Administration with IAEA**

<b>DOD: 03/14/2015</b>	<b>AMANDA K. MCLANE</b> , daughter is petitioner and requests appointment as Administrator without bond.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need date of death of the deceased spouse pursuant to Local Rule 7.1.1D.</li> <li>2. Charles E. McLane and Michael A. McLane are listed at #8 of the petition however it is unclear what their relationship is to the decedent.</li> </ol> <p><b>Note: If the petition is granted status hearings will be set as follows:</b></p> <ul style="list-style-type: none"> <li>• <b>Thursday, 11/05/2015 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <b>and</b></li> <li>• <b>Thursday, 09/08/2016 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.</li> </ul> <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>
<b>Cont. from</b>	All heirs waive bond and nominate petitioner.	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Full IAEA – o.k.	
<input checked="" type="checkbox"/> <b>Verified</b>	Decedent died intestate	
<input type="checkbox"/> <b>Inventory</b>	Residence: Clovis	
<input type="checkbox"/> <b>PTC</b>	Publication: The Business Journal	
<input type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	<b>Estimated value of the Estate:</b>	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> w/	Real property - \$248,000.00	
<input checked="" type="checkbox"/> <b>Aff.Pub.</b>	Less encumbrances - \$84,000.00	
<input type="checkbox"/> <b>Sp.Ntc.</b>	<b>Total - \$164,000.00</b>	
<input type="checkbox"/> <b>Pers.Serv.</b>	Probate Referee: Rick Smith	
<input type="checkbox"/> <b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
<b>Reviewed by:</b> LV		
<b>Reviewed on:</b> 06/02/2015		
<b>Updates:</b>		
<b>Recommendation:</b>		
<b>File 19 – McLane</b>		

**20 Gildardo Basulto Membrila, SR (CONS/P) Case No. 15CEPR00440**

Petitioner: Estela Membrila (pro per)

Attorney: Flora Istanboulian (court appointed for Conservatee)

**Petition to Appoint Probate Conservator of the Person**

		<p><b>THERE IS NO TEMPORARY.</b> No temporary was requested.</p> <p>ESTELA MEMBRILA, spouse, is petitioner</p> <p>Please see petition for details.</p> <p>Court Investigator Report filed on 5/15/15.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Court Investigator Advised Rights on 5/12/15.</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 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 checked="" 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 checked="" type="checkbox"/>	Citation	W/		
<input type="checkbox"/>	FTB Notice			
			Reviewed by: KT	
			Reviewed on: 6/2/15	
			Updates:	
			Recommendation:	
			File 20 - Membrila	

Petition for Letters of Administration with Authorization under IAEA

<b>DOD: 12/4/14</b>		<p><b>ROBERT A. STILL and RANDALL J. STILL,</b> sons, are petitioners and request appointment as Administrators without bond.</p> <p>All heirs waive bond.</p> <p>Full IAEA – o.k.</p> <p>Decedent died intestate.</p> <p>Residence: Fresno Publication: Fresno Business Journal</p> <p><b>Estimated value of the estate:</b> Real property - \$110,000.00</p> <p><b>Probate Referee: Rick Smith</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> <li>• <b>Wednesday, November 18, 2015</b> at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.</li> <li>• <b>Wednesday, August 24, 2016</b> at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.</li> </ul> <p>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.</p>
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> W/		
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 6/2/15</b></p> <p><b>Updates:</b></p> <p><b>Recommendation: SUBMITTED</b></p> <p><b>File 21 - Still</b></p>	



**23 Peggy Cupit (Def. Succ) Case No. 15CEPR00471**

Attorney Armo, Lance E. (for Lonnie Cupit, Scott Richardson, Jackie Fletcher, and Melody Armstrong - Petitioners)

**Petition to Determine Succession to Real Property**

<b>DOD: 08/27/2014</b>	<b>LONNIE CUPIT</b> , spouse, <b>SCOTT RICHARDSON, JACKIE FLETCHER</b> , and <b>MELODY ARMSTRONG</b> , children, are petitioners.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>	40 days since DOD.	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>	No other proceedings.	
<input checked="" type="checkbox"/> <b>Inventory</b>	I&A - <b>\$105,000.00</b>	
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>	Decedent died intestate	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Petitioners request Court determination that decedent's 50% interest in real property located in Fresno County pass 1/3 <sup>rd</sup> to Lonnie Cupit, 2/9 <sup>th</sup> to Scott Richardson, 2/9 <sup>th</sup> to Jackie Fletcher, and 2/9 <sup>th</sup> to Melody Armstrong pursuant to intestate succession.	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> LV
		<b>Reviewed on:</b> 06/02/2015
		<b>Updates:</b>
		<b>Recommendation:</b> Submitted
		<b>File 23 – Cupit</b>