

Probate Status Hearing Re: Failure to File Petition for Final Distribution

DOD: 3-7-06	<p>HAL B. HAVLISCH was appointed Executor with Full IAEA without bond and Letters issued on 5-24-06.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cont'd from 31414, 111814, 120914, 021015, 041415	<p>Final Inventory and Appraisal filed 10-27-06 indicated a total estate value of \$148,162.92, including \$3,517.92 cash plus real property, personal property including a stamp collection valued at \$1,500.00, and a vehicle.</p>	<p><u>OFF CALENDAR</u></p> <p>Petition for final distribution filed 6/5/15 is set for hearing on 7/14/15.</p>
Aff.Sub.Wit.	<p>On 11-30-06, a Notice of Proposed Action was filed indicating that the Executor intended to sell the real property for \$100,000.00 cash.</p>	<p>Note: The Executor, attorney Hal B. Havlisch, was previously represented by attorney Thomas C. Peterson, now deceased.</p>
Verified		
Inventory	<p>On 11-30-06, a Notice of Proposed Action was filed indicating that the Executor intended to sell the real property for \$100,000.00 cash.</p>	<p>Note: The decedent's will devises the entire estate to GOOD SHEPHERD LUTHERAN HOME OF THE WEST in Fountain Valley, CA.</p>
PTC		
Not.Cred.	<p>Nothing further was filed.</p>	
Notice of Hrg		
Aff.Mail	<p>On 12-20-13, the Court set this status hearing for failure to file a first account or petition for final distribution and mailed notice to Hal B. Havlisch.</p>	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 6-5-15
		Updates:
		Recommendation:
		File 1 - Muhley

Probate Status Hearing

DOD: 7/27/05	PUBLIC ADMINISTRATOR was appointed Successor Administrator on 1/20/15. Letters issued 2/5/15.	NEEDS/PROBLEMS/COMMENTS: Minute Order 4/21/15: Ms. Stevenson requests 6 weeks. A report regarding the issues raised by her today is being filed by 6/5/15. Note: No further report has been filed.
Cont from 042115	History: JEFFREY MCCLAY , Son, was appointed Administrator with Full IAEA with bond of \$252,000.00 on 5/23/06. Bond was filed and Letters issued 8/31/06. I&A filed 2/7/07 indicated residential real property valued at \$300,000.00.	
Aff.Sub.Wit.	On 5/10/07, a Request for Special Notice was filed by Probate Referee Steven Diebert. On 10/12/07, a Creditor's Claim of \$1,105.65 was filed by Cancer Care Associates of Fresno. There was no further activity in the estate the Court set the matter for status hearing in 2013.	
Verified	On 9/10/14, Attorney Alexander filed a petition for final distribution on behalf of his absconded client pursuant to Probate Code § 10953(c). The petition indicated that the Administrator borrowed a sum of money to satisfy obligations and expenses of the estate, secured by the real property, and intended to make a distribution to his sister, make necessary repairs, and assume the loan after closing. The attorney was unaware whether any distribution of loan proceeds was made, whether any payment to the sister was made, or whether any repairs were made on the residence. The attorney requested surcharge of the Administrator to the extent of any breach of fiduciary duty, etc., and also requested statutory and extraordinary attorney's compensation.	
Inventory	Minute Order 1/20/15 states: The Court removes Jeffrey McClay and appoints the Public Administrator in order for them to pursue surcharging Mr. McClay on the bond. Tracy Stevenson requests time to have subpoenas issued and gather information. The Public Administrator is to submit a written status report for the 4/21/15 hearing.	
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	Status Report Re Estate Assets filed 4/14/15 by Public Administrator states Deputy PA Noe Jimenez spoke with Mr. Alexander, who believed that the only asset, the residence, was lost to foreclosure. He later found out that Mr. McClay may have benefitted from a loan he secured against the residence – a line of credit for \$120,000.00 on the house in 2007. It appears he pulled all the credit line money out, and the residence was sold at a trustee sale in 2010 for \$155,000.00. Mr. Jimenez believes he has found an accurate address for Mr. McClay in Sacramento, CA. The PA and counsel agree that Mr. McClay should be surcharged the full amount of the property listed on the I&A, \$252,100 of which should be paid by the bond company, less any amounts that the company can recover or show were paid to benefit the estate.	

Reviewed by: skc
 Reviewed on: 6/5/15
 Updates:
 Recommendation:
 File 2 - McClay

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

<p>DOD: 06/24/10</p>	<p>ROGER ROWELL and DAVID E. ROWELL, were appointed as Co-Administrators with Full IAEA without bond on 02/17/11. Letters were issued on 02/17/11.</p>	<p>NEEDS/PROBLEMS/ COMMENTS:</p>
<p>Cont. from 121412, 020813, 031513, 061413, 110813, 031414, 071814, 111814</p>	<p>On 10/21/11, David E. Rowell resigned as Co-Administrator. New Letters were issued to Roger Rowell as the sole Administrator on 11/01/11.</p>	<p>CONTINUED FROM 11/18/14</p>
<p>Aff.Sub.Wit.</p>	<p>Inventory & Appraisal filed 11/29/11 shows an estate value of \$289,000.00 (1/7th of a 40% interest in real property).</p>	<p>Note: This is the 9th status hearing on this matter since December 2012.</p>
<p>Verified</p>	<p>On 10/17/12, Thomas Markeson, filed a Motion to be Relieved as Counsel stating that there was a conflict regarding the administration of the estate which has made it impossible for him to continue representing Mr. Rowell in this matter.</p>	<p>Note: The court removed Roger and David Rowell as Co-Administrators on 02/08/13 and appointed the Public Administrator.</p>
<p>Inventory</p>	<p>Order granting Attorney’s Motion to be Relived as Counsel filed 11/26/12 relieved Mr. Markeson as counsel for Roger Rowell and set this matter for status re filing of the Accounting and Petition for Final Distribution. The Court also directed counsel to provide notice to Mr. Rowell regarding the filing of the account and/or petition for final distribution.</p>	<p>Letters of Administration were issued to the Public Administrator on 03/01/13.</p>
<p>PTC</p>	<p>Notice of Entry of Order Granting Attorney’s Motion to be Relieved as Counsel filed 11/27/12 states that the Notice with a copy of the Order relieving Mr. Markeson as counsel was mailed to Roger Rowell and David Rowell on 11/27/12.</p>	<p>1. Need Accounting and Petition for Distribution and/or current written status report.</p>
<p>Not.Cred.</p>	<p>Status Report of Public Administrator filed 10/23/13 states: The former administrator, Roger Rowell, has indicated that the heirs would like the real property and that he would pay all fees. Mr. Rowell further has stated that he was working with his accountant to clear up income tax issues and anticipated that it would take approximately 6 weeks to clear up income tax issues. Mr. Rowell now states that his CPA passed away and he is working with a different CPA and that due to the death of his previous CPA it will take additional time. In order for tax returns to be completed and allow the Public Administrator enough time to finalize the estate, it is requested that the next status hearing be scheduled no sooner than four months.</p>	
<p>Notice of Hrg</p>	<p>Continued on Page 2</p>	
<p>Aff.Mail</p>		
<p>Aff.Pub.</p>		
<p>Sp.Ntc.</p>		
<p>Pers.Serv.</p>		
<p>Conf. Screen</p>		
<p>Letters</p>		
<p>Duties/Supp</p>		
<p>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>		

Status Report Regarding Final Account filed 11/14/14 states: At the hearing on 03/24/14, the judge ordered Roger Rowell to be personally present at the next hearing on 07/18/14. He did not appear, and the judge simply continued the matter to 11/18/14. In addition, the minute order was mailed to Mr. Rowell was returned as "no address found". The Public Administrator has been unable to make contact with Mr. Rowell to discuss tax issues and buying the property. This estate consists entirely of 1/7 interest in a 40% interest of real property. This is certainly nothing that could be sold. Therefore, the Public Administrator and County Counsel do not know how to proceed. Reportedly the other 6/7 of the 40% interest was put into a trust, but the Public Administrator does not have that trust or have any other knowledge of it. Unless the Court has any other suggestions, there seems to be nothing to do with this estate except to wait for Mr. Rowell to contact the Public Administrator or wait for the property to be lost to tax sale. In those cases, it is requested that status of this matter not be set for another 6 months. If any progress is made, the Public Administrator will certainly bring it to the Court's attention.

Status Report Regarding Final Account filed 06/03/15 states: At the hearing on 11/18/14, the Court requested that the Public Administrator continue to attempt to locate Roger Rowell, but his whereabouts remain unknown. This estate consists entirely of 1/7 interest in a 40% interest of real property. This is certainly nothing that could be sold. Therefore, the Public Administrator and County Counsel do not know how to proceed. Reportedly the other 6/7 of the 40% interest was put into a trust, but the Public Administrator does not have that trust or have any other knowledge of it. The Public Administrator asserts that she can do nothing more to help close this estate and requests that she be discharged.

Status Hearing Re: Account/Report of Executor on Waiver of Account and Petition for Distribution

DOD: 01/17/11	<p>DEBORAH KAMINE, daughter, was appointed Executor with full IAEA authority and without bond on 05/12/11. Letter Testamentary were issued on 05/12/11.</p> <p>Inventory & Appraisal, final, filed 10/11/13 - \$198,712.13</p> <p>Minute Order from status hearing on 10/25/13 set this matter for status regarding filing the Account/Report of Executor on Waiver of Account and Petition for Distribution.</p> <p>Former Status Report (not verified) filed 10-27-14 by Attorney Franco states at the last status hearing, the Court was informed that there was a delay in closing the estate due to an approximate seven-month wait time with the State of California Unclaimed Property Division for certain Merrill Lynch accounts that had been turned over to the state. At this time, the executor is still waiting on those funds. The Unclaimed Property Division is unable to provide an expected time other than what was previously reported. The estate is otherwise in a position to close and resolution has been reached with beneficiaries regarding assets and the large amount of reimbursement sought by the executor. The funds mentioned herein are needed for the resolution, though, which prevents a partial distribution. Petitioner would appreciate a further continuance of 60 days.</p> <p align="center"><u>Please see additional page</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 04/07/2015: Counsel represents that they are still awaiting the money from the Unclaimed Property Division. A status report is required to be filed and served if the petition is not filed at least two court days prior to 06/09/2015.</p> <p>1. Need First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Cont. from 012414, 041814, 052314, 072214, 081914, 102814, 012715, 040715		
Aff.Sub.Wit.		
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Inventory		
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Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 06/05/2015
		Updates:
		Recommendation:
		File 4 – Blankenship

Former Status Conference Statement filed 01/26/2015 states there still exists a delay in closing the estate due to a delay in receiving money from the State of California Unclaimed Property Division for certain Merrill Lynch accounts of the decedent that had been turned over to the State. At prior hearings on this matter, the Court was informed that the Unclaimed Property Division informed the Executor that there was an approximate 7 month waiting time from application for unclaimed property to receipt of funds. The claim was made in July of 2014, and was resubmitted in November due to certain errors in the original claim. As of the time of the filing of this status report, the Executor is still waiting for those funds from the State of California. The Executor received the notices attached as Exhibit A from the Unclaimed Property Division. That the State is backed up due to budget cuts and shortage of staff. The estate is otherwise in a position to close, however, the funds from the Unclaimed Property Division represent the only liquid cash assets of the estate. A resolution has been reached with beneficiaries regarding the Estate assets and the large amount of reimbursements sought by the Executor. The funds from the Unclaimed Property Divisions unfortunately are needed for the resolution, preventing a partial Petition for Final Distribution, Petitioner would appreciate a further continuance of 60-90 days.

Examiner's Note: There is at least one Request for Special Notice filed in this matter. It does not appear that Notice of Hearing or copies of the various status reports have been served on interested parties. The Court may require service of this status report and notice of any future hearing.

Notice of Motion and Motion to be Relieved as Counsel

DOD: 6-12-07	<p>CATHERINE A. AMADOR, Attorney for Former Administrator KIM MARIE GALLO, is Petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>			
<p>Cont. from 020415, 030315, 050515</p>	<p>Petitioner's Declaration in Support of Motion to be Relieved as Counsel states she is an associate of Pascuzzi, Pascuzzi & Stoker, attorneys of record for Kim Marie Gallo, the duly appointed administrator of the estate. Ms. Amador prepared and filed the petition for appointment of Ms. Gallo as administrator of the estate of Pauline Sidam, who had been Ms. Gallo's mother-in-law. Ms. Gallo was appointed 9-11-13 and Letters issued. Ms. Gallo was given full IAEA powers.</p>	<p><u>OFF CALENDAR</u></p>			
<table border="1"> <tr> <td data-bbox="105 436 162 472"></td> <td data-bbox="162 436 406 472">Aff.Sub.Wit.</td> <td data-bbox="406 436 1104 472"></td> </tr> </table>		Aff.Sub.Wit.		<p>The Inventory and Appraisal filed 10-4-13 consisted of a single asset, a single family residence in Fresno. Ms. Gallo exercised her IAEA authority and sold the house in April 2014.</p>	<p>Amended Notice of Motion and Motion to be Relieved as Counsel filed 5/19/15 is set for hearing on 6/29/15</p>
	Aff.Sub.Wit.				
<table border="1"> <tr> <td data-bbox="105 472 162 508">✓</td> <td data-bbox="162 472 406 508">Verified</td> <td data-bbox="406 472 1104 508"></td> </tr> </table>	✓	Verified		<p>Prior to the sale, Ms. Gallo had informed Ms. Amador that she and her disabled son had decided to move to Minnesota to reside with her sister. She provided an address and stated that she could be reached at her current cell phone number.</p>	
✓	Verified				
<table border="1"> <tr> <td data-bbox="105 508 162 543"></td> <td data-bbox="162 508 406 543">Inventory</td> <td data-bbox="406 508 1104 543"></td> </tr> </table>		Inventory		<p>Ms. Amador had provided Ms. Gallo with necessary documents and information to open an estate account to receive proceeds from the sale of the residence and instructions on how to handle the escrow in March 2014. Ms. Amador wrote to Ms. Gallo in April and May requesting information on the estate, and attempted to call, but the cell phone number had been disconnected. Ms. Amador wrote again in December following the status conference where she had been ordered to file the final report no later than 1-5-15, but no reply has been received.</p>	<p>Reviewed by: skc</p>
	Inventory				
<table border="1"> <tr> <td data-bbox="105 543 162 579"></td> <td data-bbox="162 543 406 579">PTC</td> <td data-bbox="406 543 1104 579"></td> </tr> </table>		PTC		<p>To the best of Ms. Amador's knowledge, the address for Ms. Gallo in Minnesota is a valid address. None of the letters have been returned undeliverable. Even if she no longer resides there, it is expected that her sister would forward her mail.</p>	<p>Reviewed on: 6-5-15</p>
	PTC				
<table border="1"> <tr> <td data-bbox="105 579 162 615"></td> <td data-bbox="162 579 406 615">Not.Cred.</td> <td data-bbox="406 579 1104 615"></td> </tr> </table>		Not.Cred.		<p>The attorney respectfully requests to be relieved as counsel of record for Ms. Gallo. She does not respond to efforts to contact her, and the attorney is unable to complete estate administration without her cooperation.</p>	<p>Updates:</p>
	Not.Cred.				
<table border="1"> <tr> <td data-bbox="105 615 162 693"></td> <td data-bbox="162 615 406 693">Notice of Hrg</td> <td data-bbox="406 615 1104 693">x</td> </tr> </table>		Notice of Hrg	x		<p>Recommendation:</p>
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	FTB Notice				

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

DOD: 01/13/2013	GLORIA B. LEDOUX , sister, was appointed Administrator with limited IAEA authority without bond on 11/06/2013.	NEEDS/PROBLEMS/COMMENTS: Minute Order of 04/14/2015: Counsel requests additional time to obtain assignments or agreements from the heirs. If the petition is filed at least two court days prior, then no appearance is necessary on 6/9/15. If the petition is not filed, then a status report must be filed at least two court days prior and counsel must appear. Minute Order of 01/09/2015: Counsel requests 90 days. If the petition is filed at least two court days prior to the hearing, then no appearance is necessary on 04/14/2015. 1. Need First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
	Letters issued on 11/06/2013.	
Cont. from 010915, 041415	Inventory and Appraisal filed 11/08/2013 shows an estate valued at \$180,000.00.	
Aff.Sub.Wit.		
Verified		
Inventory	Minute Order of 11/06/2013 set this matter for hearing for the filing of the First Account and/or Petition for Final Distribution.	
PTC		
Not.Cred.		
Notice of Hrg	Former Status Report filed 04/03/2015 states the estate remains open with the only asset consisting of an undivided one half interest in real property located at 1515 Rose Ave, Selma Ca. The property does not produce income and all expenses are being paid by the Administrator as the owner of the remaining one half interest who resides in the property. The heirs of the estate have all expressed a desire to keep the property in the family and allow the administrator the right to continue to reside at the property.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report	In order to distribute the property in undivided interests, the administrator is working on settling the creditor's claims and expenses of administration outside of the estate assets. Additional time is requested to settle the claims.	
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed on: 04/09/2015
		Updates:
		Recommendation:
		File 6 - Morales

DOD: 01/24/13		MICHAEL SPLIVALO , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Accounting is waived.	
		I & A - \$113,189.77	
		POH - \$102,772.54	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Executor - waived	
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC	Attorney - \$4,905.69	
<input checked="" type="checkbox"/>	Not.Cred.	Closing - \$2,500.00	
<input checked="" type="checkbox"/>	Notice of Hrg	Distribution, pursuant to decedent's will, is to:	
<input checked="" type="checkbox"/>	Aff.Mail	w/o	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.	Michael N. Splivalo - \$47,683.43	
<input type="checkbox"/>	Pers.Serv.	Richard G. Splivalo - \$47,683.43	
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters	05/01/14	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
			Reviewed by: JF
			Reviewed on: 06/05/15
			Updates:
			Recommendation: SUBMITTED
			File 7 - Splivalo

Attorney Vierra, Manuel N., of Hanford (for Petitioners Richard Pontecorvo and Ryan Pontecorvo)

Petition for Final Distribution Without an Accounting and Request for Statutory Attorney's Fees

DOD: 7/9/2014	RICHARD PONTECORVO and RYAN PONTECORVO , sons and Co-Administrators with Will Annexed, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:
		Continued from 4/28/2015. Minute Order states continued to allow counsel time to cure the defects.
Cont. from 042815	Accounting is waived.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	I & A — \$175,000.00	The following issue from the last hearing remains: 1. Paragraph 15 of requests the Court authorize the Administrators to pay out of funds of the estate the sum of \$6,250.00 for statutory attorney fees; and paragraph 16 requests authority for Administrators to retain the sum of \$500.00 for closing reserve. However, based upon the statement of property on hand, the estate does not contain any cash funds. Need clarification and statement regarding the source of payment for the statutory attorney fees and closing reserve.
<input checked="" type="checkbox"/> Inventory	POH — \$175,000.00 <i>(no cash)</i>	
<input checked="" type="checkbox"/> PTC		
<input checked="" type="checkbox"/> Not.Cred.	Co-Administrators — waive	
<input checked="" type="checkbox"/> Notice of Hrg	Attorney — \$6,250.00 <i>(statutory)</i>	
<input checked="" type="checkbox"/> Aff.Mail	W/O	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.	Closing — \$500.00	
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	Distribution pursuant to Decedent's Will is to:	
<input type="checkbox"/> Letters	100614	
<input type="checkbox"/> Duties/Supp	<ul style="list-style-type: none"> • RICHARD PONTECORVO – an undivided ½ interest in real property; • RYAN PONTECORVO – an undivided ½ interest in real property. 	
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input checked="" type="checkbox"/> FTB Notice		
		Reviewed by: LEG
		Reviewed on: 6/8/15
		Updates:
		Recommendation:
		File 8 - Pontecorvo

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

		Temporary Expires 6/9/15	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Continued from 4/28/15. Minute order states Mr. Garza is to have objections properly served.</p> <p>1. Need proof of service showing the objections have been served on:</p> <ul style="list-style-type: none"> a. Ilda Aguilar (petitioner) b. Maricruz Aguilar (mother)
		ILDA AGUILAR , maternal grandmother, is petitioner.	
		Please see petition for details.	
		Court Investigator Report filed on 12/2/14.	
		Objection of father, Gabriel Garza, filed on 4/7/15.	
		Declaration of Petitioner Ilda Aguilar filed on 5/5/15.	
	Cont. from 120914, 020315, 031715, 042815		
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W/	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
✓	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: KT
			Reviewed on: 6/3/15
			Updates:
			Recommendation:
			File 10 - Garza

Probate Status Hearing RE: Receipt for Blocked Account

	MARIA GUADALUPE VALENCIA , Mother, is Guardian of the Estate.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need receipt for blocked account or written status report pursuant to Local Rule 7.5.</p>
	On 4/28/15, the Court confirmed the sale of real property in which the minor owns a 20% interest valued at \$25,000.00, with the minor's share of proceeds to be deposited into blocked account.	
	The Court set this status hearing for the filing of the receipt for blocked account.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 6/5/15
		Updates:
		Recommendation:
		File 11 – Patino

Probate Status Hearing RE: Filing of the Inventory and Appraisal

Age:		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>I&A filed 6/5/15</p>
DOD:		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 6/5/15
		Updates:
		Recommendation:
		File 12 – Bergen

Petitioner

Maxine Rodriguez (Pro Per – Mother – Petitioner)

Guardian

Nellie Rodriguez Tello (Pro Per - Maternal Aunt – Guardian)

Petition - Terminate Petition for Termination of Guardianship

	See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. If this petition goes forward, need proof of service of Notice of Hearing at least 15 days prior to the hearing on Gilbert Roland Chavez (Father) pursuant to Probate Code §1460(b)(5).</p>
<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 type="checkbox"/>	Aff.Mail	X
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input checked="" type="checkbox"/>	Pers.Serv.	W
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input checked="" type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input checked="" type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: skc
		Reviewed on: 6/5/15
		Updates:
		Recommendation:
		File 13 - Rodriguez

Status Re: Filing Inventory & Appraisal

DOD: 11/18/14	<p>KENT MATSUZAKI and KATHY SANTANA were appointed Co-Executors with Full IAEA without bond on 2/3/15.</p> <p>At the hearing on 2/3/15, the Court set this status hearing re filing the Inventory and Appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Inventory and Appraisal pursuant to Probate Code §8800 or written status report pursuant to Local Rule 7.5.</p>																																												
<table border="1"> <tr><td>Aff.Sub.Wit.</td><td></td></tr> <tr><td>Verified</td><td></td></tr> <tr><td>Inventory</td><td></td></tr> <tr><td>PTC</td><td></td></tr> <tr><td>Not.Cred.</td><td></td></tr> <tr><td>Notice of Hrg</td><td></td></tr> <tr><td>Aff.Mail</td><td></td></tr> <tr><td>Aff.Pub.</td><td></td></tr> <tr><td>Sp.Ntc.</td><td></td></tr> <tr><td>Pers.Serv.</td><td></td></tr> <tr><td>Conf. Screen</td><td></td></tr> <tr><td>Letters</td><td></td></tr> <tr><td>Duties/Supp</td><td></td></tr> <tr><td>Objections</td><td></td></tr> <tr><td>Video Receipt</td><td></td></tr> <tr><td>CI Report</td><td></td></tr> <tr><td>9202</td><td></td></tr> <tr><td>Order</td><td></td></tr> <tr><td>Aff. Posting</td><td></td></tr> <tr><td>Status Rpt</td><td></td></tr> <tr><td>UCCJEA</td><td></td></tr> <tr><td>Citation</td><td></td></tr> <tr><td>FTB Notice</td><td></td></tr> </table>			Aff.Sub.Wit.		Verified		Inventory		PTC		Not.Cred.		Notice of Hrg		Aff.Mail		Aff.Pub.		Sp.Ntc.		Pers.Serv.		Conf. Screen		Letters		Duties/Supp		Objections		Video Receipt		CI Report		9202		Order		Aff. Posting		Status Rpt		UCCJEA		Citation	
Aff.Sub.Wit.																																														
Verified																																														
Inventory																																														
PTC																																														
Not.Cred.																																														
Notice of Hrg																																														
Aff.Mail																																														
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Order																																														
Aff. Posting																																														
Status Rpt																																														
UCCJEA																																														
Citation																																														
FTB Notice																																														
		<p>Reviewed by: skc</p> <p>Reviewed on: 6/5/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 14 - Fujisawa</p>																																												

Status Re: Filing Inventory & Appraisal

Age:		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>I&A filed 4/14/15</p>
DOD:		
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input type="checkbox"/>	Pers.Serv.	
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: skc
		Reviewed on: 6/5/15
		Updates:
		Recommendation:
		File 15 - Delaney

		See petition for details.	NEEDS/PROBLEMS/ COMMENTS: <u>Continued from 4/28/15.</u> 1. Petitioner's Declaration filed 3-11-15 states Mr. Bandala was served by registered mail. No return receipt signed by Mr. Bandala is provided. Probate Code §1511 requires personal service. <i>Declaration of Due Diligence filed 6/3/15 provides tracking information for registered mail to Orlando Bandala, ending in "Customs clearance processing complete" on 5/26/15 in Mexico.</i> 2. If diligence is not found, need proof of service on Maternal Grandparents and paternal grandfather of Yajayra pursuant to Probate Code §1511. <i>Declarations of Due Diligence filed 6/3/15.</i>	
Cont from 042815				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			x
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
		Reviewed by: skc Reviewed on: 6/5/15 Updates: Recommendation: File 16 – Bandala, Sandoval, Sanchez		

Probate Status Hearing Status Re: Filing Inventory & Appraisal

Age:		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>I&A filed 6/4/15</p>
DOD:		
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input type="checkbox"/>	Pers.Serv.	
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: skc
		Reviewed on: 6/5/15
		Updates:
		Recommendation:
		File 17 - Soltero

Petitioner Gilbert R. Chavez Jr. (Pro Per – Step-Father – Petitioner)
 Petitioner Amy Nicole Chavez (Pro Per – Wife of Step-Father – Petitioner)

Petition for Appointment of Temporary Guardian of the Person

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing and proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) on: - Vanessa M. Vasquez (Mother)	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 6/5/15	
			Updates:	
			Recommendation:	
			File 18 - Vasquez	

Petitioner Hinojosa, Eva Antonia (pro per – maternal great-aunt)

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

Age: 1	<p align="center"><u>NO TEMPORARY IN PLACE:</u> <u>TEMPORARY DENIED ON 03/02/15 DUE TO</u> <u>NO APPEARANCES AT HEARING</u></p> <p>EVA ANTONIA HINOJOSA, maternal great-aunt, is Petitioner.</p> <p>Father: MANUEL JURADO – <i>personally served on 03/02/15</i></p> <p>Mother: ALESHA FLORES – <i>Consent & Waiver of Notice filed 03/03/15</i></p> <p>Paternal grandfather: MANUEL JURADO, SR. – <i>Consent & Waiver of Notice filed 05/22/15</i></p> <p>Paternal grandmother: ELIDA MOLINA – <i>Consent & Waiver of Notice filed 05/22/15</i></p> <p>Maternal grandfather: DANNY FLORES</p> <p>Maternal grandmother: DONNA ALCANTAR – <i>Consent & Waiver of Notice filed 03/03/15</i></p> <p>Siblings: ALICIA JURADO (26), VICTORIA JURADO (24), ELIZABETH JURADO (20), MANUEL JURADO (17) – <i>Consent & Waiver of Notice filed 05/22/15</i>, MORGAN GONZALEZ (7), ROSALYN (3)</p> <p>Petitioner states that she has raised Cierra since birth and that the parents agree that she raise Cierra.</p> <p>Court Investigator Samantha Henson filed a report on 04/21/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 04/28/15</u></p> <p>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 & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for:</p> <p>a. Danny Flores (maternal grandfather)</p> <p>b. Alicia Jurado (sibling)</p> <p>c. Victoria Jurado (sibling)</p> <p>d. Elizabeth Jurado (sibling)</p>
Cont. from 042815		
<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 type="checkbox"/> Aff.Mail <input checked="" type="checkbox"/>		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv. <input type="checkbox"/> w/		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input 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		
		<p>Reviewed by: JF</p> <p>Reviewed on: 06/05/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 19 - Jurado</p>

Petitioner: Christian Torres (pro per)

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

		<u>Temporary Expires 6/9/15</u>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 5/5/15.</p>
		CHRISTIAN TORRES, brother, is Petitioner.	
		Please see petition for details.	
Cont. from 050515		Objection to Guardianship filed 02/26/15 by Martin Torres.	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed on: 6/3/15
			Updates:
			Recommendation:
			File 20A - Torres

Petitioner: Ruben Luna (pro per)

Petitioner: Arcelia Luna (pro per)

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

		<p>RUBEN LUNA and ARCELIA LUNA, maternal grandparents, are Petitioners.</p> <p>Please see petition for details.</p> <p>Objection to Guardianship filed 02/26/15 by Martin Torres</p> <p>Court Investigator Report filed on 4/26/15</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 5/5/15. Minute Order states the Court grants one last continuance and opportunity for Martine Torres, father, to speak with the Court Investigator. Mr. Torres is directed to the Clerk's Office forthwith to set up an appointment.</p> <p>1. Petition does not include the child information attachment, as required.</p> <p>Court Investigator Jennifer Young to provide supplemental investigation report.</p>
Cont. from 050515			
	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		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
		<p>Reviewed by: KT</p> <p>Reviewed on: 6/3/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 20B - Torres</p>	

DOD: 03/23/2014		DAVID HAYSLIP, son is petitioner and requests appointment as Administrator without bond. Full IAEA - ? Decedent died intestate Residence: Fresno Publication: The Fresno Bee <u>Estimated value of the Estate:</u> Personal property - \$48,000.00 Probate Referee: Rick Smith	NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR.</u> REQUEST FOR DISMISSAL ENTERED 06/08/2015. Minute Order of 05/05/2015: Counsel requests 30 days. The following issues remain: <ol style="list-style-type: none"> 1. Need Affidavit of Publication. 2. Need Waiver of Bond on Mandatory Judicial Council Form DE-142. 3. Need Duties & Liabilities of Personal Representative, Mandatory Judicial Council Form DE-147. 4. Need Confidential Supplement to Duties & Liabilities of Personal Representative, Mandatory Judicial Council Form DE-147S. 5. Need Order. 6. Need Letters. Note: If the petition is granted status hearings will be set as follows: <ul style="list-style-type: none"> • Tuesday, 09/08/2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Tuesday, 07/05/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. 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.	
Cont. from 050515				
<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.			x
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters	x		
<input type="checkbox"/>	Duties/Supp	x		
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order	x		
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
Reviewed by: LV Reviewed on: 06/05/2015 Updates: 06/08/2015 Recommendation: File 21 - Hayslip				

Petitioner **Martinez, Rosalba (Pro Per Maternal Grandmother)**

Petitioner **Martinez, Samuel (Pro Per Maternal Step-Grandfather)**

Petition for Appointment of Guardian of the Person

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> If this petition goes forward, need continuance for court investigation and the following issues exist:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need personal service of Notice of Hearing with a copy of the petition on both parents per Probate Code §1511. 3. Need service of Notice of Hearing with a copy of the petition on paternal grandparents and maternal grandfather per Probate Code §1511. 	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report	X		
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 6/5/15	
			Updates:	
			Recommendation:	
			File 22 - Gomez	

23 Tristan Garcia, Joshua Garcia (GUARD/P) Case No. 15CEPR00370

Petitioner Novella, Diane (Pro Per – Non-Relative)

Petition for Appointment of Guardian

Tristan Age: 7 DOB: 01/20/2008	<p><u>NO TEMPORARY REQUESTED</u></p> <p>DIANE NOVELLA, non-relative, is petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Examiner did not review the petition based on the Court Investigator's report filed on 04/26/2015 stating that the petitioner wishes to withdraw her petition.</p>
Joshua Age: 6 DOB: 05/01/2009		
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
	Reviewed by: LV	
	Reviewed on: 06/05/2015	
	Updates:	
	Recommendation:	
	File 23 - Garcia	

24 Irvin M. Shackelford (Estate) Case No. 15CEPR00462

Attorney Guerrero, Danielle R. (for Susan L. Carlisle – Petitioner – Daughter)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA

DOD: 11/28/2014		SUSAN L. CARLISLE , daughter/named executor without bond, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Tuesday, 11/10/2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Tuesday, 08/09/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
		Full IAEA – o.k.	
		Will dated: 10/25/1994	
Cont. from		Residence: Fresno	
<input type="checkbox"/>	Aff.Sub.Wit.	s/p	
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory	Publication: The Business Journal	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Estimated value of the Estate:	
		Real property - \$232,000.00	
		Probate Referee: Steven Diebert	
<p>Reviewed by: LV</p>			
<p>Reviewed on: 06/05/2015</p>			
<p>Updates:</p>			
<p>Recommendation: Submitted</p>			
<p>File 24 - Shackelford</p>			

Age: 9		KIMBERLY ANN BRYANT , maternal grandmother, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the Petition for Appointment of Guardian of the Estate <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: <ol style="list-style-type: none"> a. W. Kevin Bryant (co-guardian of the Person/maternal grandfather) – <i>personal service required pursuant to Probate code § 1511(b)(2)</i> b. Demonte Wilson (father) – <i>personal service required</i> c. Paternal grandparents – <i>service by mail sufficient</i> 3. Petitioner does not address bond. Per Local Rule 7.8.1 (i), absent good cause, it is Court's policy to block all funds in guardianship estates. Need Order to Deposit Money into Blocked Account. <p>Note: In the guardianship of the person petition, W. Kevin Bryant (co-guardian) was identified as the maternal grandfather. In this Petition, petitioner did not list the maternal grandfather's name and stated "decline to state". Therefore, it is unclear if W. Kevin Bryant is the maternal grandfather or not. If another person is the maternal grandfather then he is entitled to notice 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>.</p> <p>Note: Status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Tuesday, July 28, 2015 at 9:00am in Dept. 303 for filing of the Receipt for Blocked Account; • Tuesday, October 13, 2015 at 9:00am in Dept. 303 for filing of the Inventory & Appraisal; and • Tuesday, September 13, 2016 at 9:00am in Dept. 303 for filing of the First Account.
		KIMBERLY ANN BRYANT and W. KEVIN BRYANT , maternal grandparents, were appointed Guardian of the Person in case no. 14CEPR00086 on 04/03/14.	
Cont. from		Father: DEMONTE WILSON – <i>currently incarcerated</i>	
Aff.Sub.Wit.		Mother: SANDRA LITTLE – <i>deceased</i>	
✓ Verified		Paternal grandparents: UNKNOWN	
Inventory		Maternal grandfather: NOT LISTED (W. KEVIN BRYANT?)	
PTC		Petitioner states that guardianship of the estate is necessary because the minor will be receiving a settlement related to her mother's death.	
Not.Cred.		Estimated Value of the Estate: Personal property - \$15,000.00	
Notice of Hrg	x		
Aff.Mail	x		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.	x		
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
CI Report	n/a		
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA	n/a		
Citation			
FTB Notice			
Reviewed by: JF			
Reviewed on: 06/05/15			
Updates:			
Recommendation:			
File 25 – Wilson			

Petitioner Beltran, Catalina (Pro Per – Spouse – Petitioner)

Petition for Appointment of Probate Conservator of the Person

See petition for details.			<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator advised rights on 5/19/15</p> <p>Voting rights affected – need minute order</p> <p><u>Note:</u> The petition does not request medical consent powers under Probate Code §2355; therefore, a Capacity Declaration is not mandatory. If medical consent powers are requested, amendment and/or further notice may be required, and a Capacity Declaration completed by the doctor will be required.</p>
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 6/5/15
			Updates:
			Recommendation:
			File 26 - Beltran

See petition for details.			<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator advised rights on 5/29/15</p> <p><u>Note:</u> Ex Parte Order entered 5/27/15 granted temporary conservatorship of the person and estate to the Public Guardian and also revoked all authority under any document except orders of this Court, including powers of attorney and trusts.</p> <p>1. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing on Proposed Conservatee Jean Walters.</p>
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 6/5/15
			Updates:
			Recommendation:
			File 27 - Walters

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Petitioner states: Robert took Ms. Walters to an attorney and had her name his as agent under POA, beneficiary under her will and trust, and trustee. It is necessary that all of those powers be immediately suspended.

See also PG Investigation Report filed confidentially re APS referrals since 2010.

Declaration of Deputy Public Guardian Jennifer Segura filed 6/5/15 states after her initial investigation, she returned to the three homes owned by the Conservatee. The home from which she was removed by Robert Renovato and in which he and his wife Patricia Renovato now live is 4552 N. Delno in Fresno. Reportedly, tens of thousands of dollars from the conservatee's bank accounts were used to remodel the home. Attached at Exhibit A are pictures taken by Ms. Segura.

Another parcel on Delno owned by the Conservatee, 4532 N. Delno, is occupied by Patricia's daughter's family. Attached are pictures at Exhibit B.

When the investigation began, Ms. Walters was living in her third house, 4551 N. Fruit in Fresno. On her last visit, she was found hiding in her shed. Ms. Segura immediately moved her to a facility appropriate to provide the care she needs. That address is being kept confidential. Attached are pictures of her living conditions. Due to the rat infestation, estimates were obtained for rodent control. See attached pictures.

It is important to note that Robert and Patricia convinced the Conservatee to move out so they could remodel her home for her. Not only was she kept from moving back, she was left to live in a rat-infested unhealthy environment. On 5/11/15, Robert acknowledge to Ms. Segura that it appeared he was not taking care of her. On 5/12/15, Patricia was at the Fruit property during one of the visits, so she is clearly aware of the conditions in which she and Robert left the Conservatee.

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Notice of Hearing.</p> <p>2. Need proof of personal service of Notice of Hearing at least five court days prior to the hearing per Probate Code §2250(e) or declaration of due diligence on: - Natacsa Turner (Mother)</p>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 6/5/15	
			Updates:	
			Recommendation:	
			File 28 – Haqq	