



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

(1) Administrator's Petition for Waiver of Accounting, (2) Statutory Attorney Fees, and (3) Final Distribution Under Probate Code 11600

DOD: 5/11/2006		SHELBY BENSON , Administrator with bond of \$154,000.00, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED TO 07/25/12</u> Per request of Counsel</p> <ol style="list-style-type: none"> Petition is not verified. Probate Code §1021. Beneficiary Catherine Laurie died on 1/26/2010, after the decedent. Pursuant to Probate Code 10954(b)(5) if the person entitled to distribution is an estate, the waiver of account shall be executed by the personal representative of the estate. The waiver of account was signed by Gerald Laurie on behalf of Catherine Laurie. Need (probate) Letters giving Gerald Laurie authority to waive on behalf of the Estate of Catherine Laurie. Petition states distribution has been made of <u>all</u> the assets of the estate to the three beneficiaries. Probate Code §11623 states the personal representative may petition the court for authority to make preliminary distributions. However the aggregate of all property distributed shall not exceed 50% of the net value of the estate. In this case the Petitioner did not petition the court for authority to make preliminary distributions. <p>Please see additional page</p> <p>Reviewed by: KT/JF</p> <p>Reviewed on: 06/19/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 4 - Blesh</p>
		Accounting is waived (see note #2)	
Cont. from 052212		I & A \$189,531.84	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified	X Administrator - waives	
<input checked="" type="checkbox"/>	Inventory	Attorney - \$6,685.96 (statutory)	
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.	Costs - \$1,218.84	
<input type="checkbox"/>	Notice of Hrg	X Distribution, pursuant to intestate succession, is to:	
<input type="checkbox"/>	Aff.Mail	X	
<input type="checkbox"/>	Aff.Pub.	Shelby Benson - 1/3	
<input type="checkbox"/>	Sp.Ntc.	Catherine Laurie - 1/3	
<input type="checkbox"/>	Pers.Serv.	David Blesh - 1/3	
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters	5/12/11	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input type="checkbox"/>	Order	X	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice	X	

NEEDS/PROBLEMS/COMMENTS (continued):

4. Petition states 1/3 of the estate was distributed to Catherine Laurie. Catherine Laurie died after the decedent. Court may require more information regarding distribution to this deceased beneficiary.
5. Petition requests reimbursement of costs to attorney totaling \$1,218.84. Need itemization of costs.
6. Petition does not contain a statement regarding if notice to the Franchise Tax Board was performed, as required by Probate Code 9202(c)(1).
7. Need Notice of Hearing.
8. Need proof of service of the Notice of Hearing on all interested parties.
9. Need Order.

DOD: 9-10-11		<p>RICHARD GONZALES, Son and Administrator with Limited IAEA without bond, is Petitioner.</p> <p>Sale price: \$70,000.00 Overbid: \$74,000.00</p> <p>Appraisal: \$73,000.00</p> <p>Property: 3147 N. Gentry Ave. Fresno, CA 93722</p> <p>Publication: Fresno Business Journal</p> <p>Buyer: Manuel Ventura Solano</p> <p>Broker: 6% or \$4,200.00 (\$2,100.00 each to C-21 C. Watson Real Estate and Casa Blanca Real Estate Group, Inc.)</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need proposed vesting pursuant to #4 of the petition. 2. The Court will set status hearing for the filing of a bond in the amount of the proceeds or proof of funds in blocked account for: 3. Need order.
<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 <small>w</small>		
<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 <small>X</small>		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed on: 6-19-12	
		Updates:	
		Recommendation:	
		File 5 - Gonzales	

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

DOD: 11/18/10		<p>BEVERLY T. ADAMS, wife/named Executor without bond, is Petitioner.</p> <p>Petitioner is a resident of St. Johns, Florida</p> <p>Full IAEA – OK</p> <p>Will dated 05/17/01</p> <p>Residence: Clovis</p> <p>Publication: The Business Journal</p> <p>Estimated Value of the Estate: \$0.00</p> <p>Probate Referee: STEVEN DIEBERT</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 05/23/12</p> <p>As of 06/19/12, the following remains outstanding:</p> <ol style="list-style-type: none"> Will is not self-proving. Need Affidavit of Subscribing Witness. The court may require bond if the proposed personal representative resides outside California or for other good cause, even if the will waives bond, pursuant to California Rules of Court 7.201 (b) and Probate Code 8571. <p>Note: If petition is granted, Court will set status hearings as follows:</p> <ul style="list-style-type: none"> October 26, 2012 at 9:00 a.m. in Dept. 303 for filing of inventory and appraisal; and July 26, 2013 at 9:00 a.m. in Dept. 303 for filing of first account and/or petition for final distribution. <p>Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.</p>
Cont. from 052312			
<input type="checkbox"/> Aff.Sub.Wit.	x		
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	w/		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input 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			
		<p>Reviewed by: JF</p> <p>Reviewed on: 06/19/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7 - Adams</p>	

Application to Fill Vacancy of Trustee Pursuant to Paragraph 12.4 "Filling Vacancies" by J. Michael Farley, Son of Melvin Farley and Beneficiary Under the Trust Under the Survivor's Trust and Family Trust Created Under Articles 6 and 7

<p>Melvin L. Farley DOD: 9-27-99</p>	<p>J. MICHAEL FARLEY is Petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
<p>Ruth L. Farley DOD: 11-9-11</p>	<p>Petitioner states Melvin L. Farley died in 1999 and Ruth L. Farley died in 2011. Both of the successor trustees (Conrad Rushing and Bill McMahan) have resigned. The surviving spouse, Ruth L. Farley, sold the major asset of the trust, 40 acres of vineyards in Fowler, in 2000 and in 2002 purchased a residence for the same amount, and, thereupon, in violation of her authority and provisions of the trust, on 10-20-02, placed the residence in joint tenancy with her daughter, Diane Clark. Subsequently, the now deceased spouse removed her name from the deed on 4-10-05 so that the property was held of title in the name of Diane L. Clark. On 4-6-07, Diane L. Clark borrowed against the property and it is probably encumbered at this time.</p>	<p>1. The Court may require further information with regard to the basis of the petition.</p> <p>Petitioner requests appointment, but does not provide details of the alleged vacancy in the office of trustee. He describes alleged unauthorized transfer of trust assets, but it is unclear how this is related to the request that is before the Court.</p> <p>2. The petition does not state the names and addresses of each person entitled to notice pursuant to Probate Code §17201.</p>
<p>Aff.Sub.Wit.</p>	<p>Petitioner learned after the death of Ruth L. Farley that Diane Clark claims there are no assets in the trust and Petitioner and his sister Frances Anita Rushing and his half-sister Susan Clare Williams assert that they have an interest in the property on Carson and he has caused to be executed and will record a Lis Pendens against said realty.</p>	<p>Reviewed by: skc</p>
<p>✓ Verified</p>	<p>Petitioner requests the Court appoint him as trustee of the trust.</p>	<p>Reviewed on: 6-19-12</p>
<p>Inventory</p>		<p>Updates:</p>
<p>PTC</p>		<p>Recommendation:</p>
<p>Not.Cred.</p>		<p>File 9 - Farley</p>
<p>Notice of Hrg</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>		

Age: 92	<p>ANITA LEAL-IDROGO, daughter, is Petitioner and requests appointment herself as Temporary Conservator of the Person with certain medical consent powers, and of BRUCE D. BICKEL, professional fiduciary, as Temporary Conservator of the Estate with bond of \$250,000.00.</p> <p>Estimated Value of Estate: Personal property: \$1,122,077.80 Annual income: \$ 54,000.00 Total: \$1,176,077.80 Plus cost of recovery: \$ 112,441.56 Total bond: \$1,298,519.36</p> <p>Petitioner states Ms. Haney suffers from a myriad of medical conditions including psychosis, dementia, depression, hypothyroidism, hypoglycemia, urinary tract infection (UTI) and Diabetes Mellitus II. On a continual basis she refuses preventative medical treatment associated with the control of these conditions, especially diabetes. She has already undergone a below-the-knee right leg amputation as a result of her diabetes and her left leg is currently causing pain and requires attention; however, she refuses medical attention and continues to take her insulin <u>at will</u> instead of using a monitor. Petitioner believes she also continues to suffer from a UTI for which she refuses to seek examination or treatment.</p> <p>For the period of temporary conservatorship, Petitioner requests authority to have Ms. Haney examined and treated by appropriate physicians skilled in the area of expertise necessitated by her conditions and to hire an appropriate nurse to monitor and administer all non-psychosis and non-dementia prescribed medication, including insulin injections.</p> <p>Petitioner also requests to change Ms. Haney's residence during the temporary conservatorship, <u>if necessary</u>. Petitioner believes she would prefer to stay in her home, and believes she has sufficient assets to pay for home healthcare providers, but the home may require substantial modifications to accommodate her continual presence. If a determination is made by Petitioner in consultation with experienced professionals and medical providers, Petitioner seeks court authorization to change Ms. Haney's residence to a skilled nursing or assisted living facility in the Fresno area.</p> <p style="text-align: center;">SEE PAGE 2</p>	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p><u>Note: Court Investigator Jennifer Young to file report.</u></p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service of Notice of Hearing with a copy of the Temporary Petition at least five court days prior to the hearing on Proposed Conservatee Mildred Haney per Probate Code §2250(e). 3. Need proof of service of Notice of Hearing with a copy of the Temporary Petition at least five court days prior to the hearing on relatives: <ul style="list-style-type: none"> - Alfred Leal (son) - Raymond Valenzuela (grandson) - Carmen Apodaca (sister) 	
DOB: 4-16-20			
Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg		X	
Aff.Mail		X	
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.		X	
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
Objections			
Video Receipt			
CI Report		X	
9202			
<input checked="" type="checkbox"/> Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: skc</p> <p>Reviewed on: 6-19-12</p> <p>Updates:</p> <p>Recommendation: File 12 - Haney</p>	

Regarding temporary conservatorship of the estate: Petitioner has been able to confirm 12 financial accounts at 5 different financial institutions, and believes there are others. However, for the period of the temporary conservatorship of the estate, Petitioner requests appointment of Bruce D. Bickel and court authorization for him to marshal only certain accounts for the purpose of facilitating payment of Ms. Haney's financial obligations and to secure payment for healthcare givers and/or an assisted living facility. The total approximate balance of the accounts is \$228,007.57. Therefore, during temporary conservatorship, Petitioner requests that a bond of only \$250,000.00 be required.

Court Investigator Jennifer Young to file report.

Petition for Termination of Guardianship

Age: 8 DOB: 07/09/03	JESSICA ZAMORA, mother, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Petitioner states that the father is unknown; however, according to the original Petition for Guardianship, the father of the minor is Derrick Laughter. Need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Termination of Guardianship <u>or</u> Consent and Waiver of Notice <u>or</u> Declaration of Due Diligence for: - Derrick Laughter (father)
	GLORIA DOBBINS, maternal great-grandmother, was appointed as Guardian on 03/29/07. (<u>Personally served on 05/14/12</u>)	
	Father: UNKNOWN (DERRICK LAUGHTER per original guardianship petition)	
Cont. from	Paternal grandparents: UNKNOWN	
Aff.Sub.Wit.		
✓ Verified		
Inventory	Maternal grandmother: DECEASED Maternal grandfather: DAVID ZAMORA – served by mail on 05/16/12	
PTC		
Not.Cred.		
✓ Notice of Hrg	Petitioner states that she consented to her grandmother, Gloria Dobbins, becoming Jaden's guardianship back in 2007 because she was very young and not stable. She wanted Jaden to have a home and his own bed. Petitioner states that the guardian graciously took Jaden in and she really appreciates the love she has shown Jaden and the home she has provided him. Petitioner states that she is now stable in her own home and has 3 other children who live with her. Her children are clean and happy. Her daughter who is in school is doing very well. Petitioner states that she also went back to school and earned her high school diploma. Petitioner states that her grandmother, the guardian, is now 80 years old and in recent months has become less able to care for herself and Jaden. Petitioner states that Jaden has expressed concern about losing the guardian and where he will live after she passes away. Petitioner states that Jaden lives alone with the guardian and the responsibility he feels when she falls ill is more than he should have to bear as an 8 year old. Petitioner states that Jaden needs to transition to her home and life with her before the guardian passes away and that it would be healthier for him to enjoy a mother-son relationship with her and be with his siblings.	
✓ 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	Court Investigator Julie Negrete filed a report on 06/18/12. The report states that based on the information received, the Petitioner appears to be appropriate and there were no real concerns noted about her ability to care for Jayden. Further, Ms. Zamora has remained actively involved in Jayden's life and has a relationship with him. It would be in the best interest of the child that visitations are increased in order to help facilitate the transitions of terminating the guardianship in the near future. Counseling would also appear appropriate. Therefore, it is recommended that the request to terminate the guardianship be continued for six months.	

Reviewed by: JF
 Reviewed on: 06/19/12
 Updates:
 Recommendation:
 File 13 - Zamora

14A Jesse R. Trask (GUARD/PE) Case No. 11CEPR01084

Atty Reinhardt, Mavis Jean (Pro Per – Maternal Grandmother – Guardian)

Atty Reinhardt, Alan William (Pro Per – Maternal Step-Grandfather – Guardian)

Status Hearing Re: Receipt of Blocked Account

Age: 7	<p>MAVIS JEAN and ALAN WILLIAM REINHARDT, Maternal Grandmother and Step-Grandfather, were appointed Co-Guardians of the Person and Estate of Jesse R. Trask on 2-9-12 with all funds ordered to be placed in a blocked account.</p> <p>The original petition stated Jesse's mother, who passed away in January 2011, had a life insurance policy through her employer (County of Fresno) that was estimated at between \$10,000.00 and \$20,000.00, and Petitioners have been instructed by the insurance company to place the funds into a blocked account.</p> <p>The Court set this status hearing for receipt of funds in blocked account.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 05/14/12 As of 06/19/12, no additional documents have been filed.</p> <p>Note: Examiner met with the Guardian after the last hearing to explain the process:</p> <p>Please note that the Letters issued 2-16-12 do not authorize the Guardians to take possession of money or property without specific court order; <u>however</u>, the Order to Deposit Money Into Blocked Account filed 2-9-12 is the specific court order that authorizes "all funds" to be deposited into a blocked account.</p> <p>The Letters, together with that Order, allows Guardians to obtain the funds to place into the blocked account. The Guardians were provided a blank copy of the Receipt Form (MC-356) for the bank to sign upon deposit. As of 06/19/12, the Receipt has not been filed.</p> <p>1. Need receipt of funds in blocked account.</p>
DOB: 1-16-05		
Cont. from 032612, 051412		
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 X		
UCCJEA		
Citation		
FTB Notice		
	<p>Reviewed by: skc/JF</p> <p>Reviewed on: 06/19/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 14A - Trask</p>	

14B Jesse R. Trask (GUARD/PE) Case No. 11CEPR01084

Atty Reinhardt, Alan William (pro per – maternal step-grandfather/Guardian)

Atty Reinhardt, Mavis Jean (pro per – maternal grandmother/guardian)

Status Hearing Re: Filing of the Inventory and Appraisal

Age: 7 DOB: 01/16/05	<p>MAVIS REINHARDT and ALAN REINHARDT, maternal grandmother and step-grandfather, were appointed as Guardian of the Person and Estate on 02/09/12 and Letters were issued on 02/16/12.</p> <p>Order to deposit money into blocked account was filed 02/09/12.</p> <p>Minute Order dated 02/09/12 set this matter for status regarding filing of the Inventory & Appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 06/11/12 Minute order from 06/11/12 hearing states: No appearances. Matter continued to 06/25/12. The Court orders Mavis Reinhardt and Alan Reinhardt to be personally present on 06/25/12.</p> <p><u>As of 06/19/12, no Receipt for Funds in Blocked Account has been filed.</u></p> <ol style="list-style-type: none"> 1. Need Inventory & Appraisal. 2. Need Receipt of Funds in Blocked Account. 	
Cont. from 061112			
Aff.Sub.Wit.			
Verified			
Inventory			x
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: JF	
		Reviewed on: 06/19/12	
		Updates:	
		Recommendation:	
		File 14B - Trask	

15 Marvin Henry Ables (Estate)

Atty Tatum, Ovonder (pro per – Administrator)

Probate Status Hearing Re: Filing of an Inventory and Appraisal

DOD: 09/02/11	<p>OVONDER TATUM, niece, was appointed as Administrator without bond on 01/24/12 and Letters were issued on 01/24/12.</p> <p>Notice of Hearing (Probate) filed 01/26/12 set this matter for status of filing an Inventory & Appraisal on 01/25/12 and set a status for filing of the First Account or Petition for Final Distribution on 01/25/13. Clerk's Certificate of Mailing states that the Notice of Hearing was mailed to Ovonder Tatum on 01/26/12.</p> <p>Request for Special Notice was filed 03/21/12 by Rodney Finley.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Inventory & Appraisal.</p>
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		<p>Reviewed by: JF</p> <p>Reviewed on: 06/19/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 15 - Ables</p>
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		