



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 **Lillian Salwasser (Estate)** Case No. 07CEPR00104
 Atty Matthai, Edith (for Craig A. Houghton – Objector)
 Atty Manock, Charles K. (for George Salwasser/Executor of the Estate of Lillian Salwasser)
 Atty Chielpegian, Michael S (for Marvin Salwasser/Administratoor with Will Annexed of Walter Salwasser Respondent)
 Atty Wright, Janet L. (for George Salwasser/Executor)
 Atty Farley, Michael L. (of Visalia, for Gary E. Salwasser - Beneficiary)
Amended and Restated First Account and Report (Status)

	George Salwasser is Executor.	NEEDS/PROBLEMS/COMMENTS:
	An Amended and Restated First Account was filed on 1-13-10 and has been continued with reference to additional ongoing matters in this and other related cases.	Note: It is Examiner's understanding that at this point a further amended petition for final distribution is expected from Executor to close the estate once the other related matters are settled. This continued hearing is for status on such expected petition for final distribution.
	For background, Executor's Status Report filed 10/24/11 states: The purpose of this hearing was to determine whether any further accounting would be necessary as the PrC §850 petitions of the Lillian Salwasser Estate and Walter Salwasser Estate were settled by Settlement Agreement and Release entered into on 6/21/11. Based on the Settlement terms it appears no further accounting should be required for any account reported in the pending Account for accounts held in Decedent or her surviving spouse's names at the time of Decedent's death.	As of 6-20-12, a Petition for Final Distribution has not yet been filed.
Aff.Sub.Wit.		1. Need Petition for Final Distribution or current status report.
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		
	The Probate Estate Account (opened after Decedent's date of death) and collections, if any, on Promissory Notes reported in the Account, would need to be supplemented through date of distribution (Two notes are currently the subject of lawsuits); until there is determination as to the collectability on the Notes, tax matters cannot be finally determined.	
	A mediation is scheduled for 11/16/11 between George and Gary Salwasser; therefore, a continuance of 4 to 6 months is appropriate under the circumstances.	
	Since then, the matter has been continued to 2-27-12 and now to 6-25-12 per stipulation of the parties.	
		Reviewed by: NRN / skc
		Reviewed on: 6-20-12
		Updates:
		Recommendation:
		File 1A – Salwasser

**Amended First and Final Account and Report of Administrator and
 Petition for Allowance of Ordinary and Extraordinary Commissions
 and Fees and for Distribution [Prob. C. 9202, 10800, 10810, 10951,
 11600, 11850(a)]**

DOD: 3/30/10		PUBLIC ADMINISTRATOR , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 8/18/10 – 3/26/12	<u>Minute Order 5-14-12: Attorney Sanoian advises the Court that she has some objections.</u>
Cont. from 051412			
	Aff.Sub.Wit.	Accounting - \$188,300.00	<u>As of 6-19-12, nothing further has been filed.</u>
✓	Verified	Beginning POH - \$188,300.00	
✓	Inventory	Ending POH - \$132,879.51	
✓	PTC	Administrator - \$6,319.00	
	Not.Cred.	(statutory)	
✓	Notice of Hrg	Administrator X/O - \$3,248.00 (per	
✓	Aff.Mail	Local Rule for sale of real property, sale	
	Aff.Pub.	of personal property and preparation	
✓	Sp.Ntc.	of taxes)	
	Pers.Serv.	Attorney - \$6,319.00	
	Conf. Screen	(statutory, payable \$3,819.00 to County	
✓	Letters	Counsel and \$2,500.00 to Susan	
	Duties/Supp	Moore.)	
	Objections	Bond fee - \$588.44 (o.k.)	
	Video Receipt	Court fees - \$204.00	
	CI Report	(certified copies)	
✓	9202		
✓	Order	Closing - \$1,000.00	
	Aff. Posting		
	Status Rpt	Distribution, pursuant to intestate	
	UCCJEA	succession, is to:	
	Citation	Robert Hartley - \$38,400.35	
✓	FTB Notice	David Guy - \$25,600.24	
		Robert Guy - \$25,600.24	
		Melody McCombs - \$25,600.24	
			Reviewed by: KT / skc
			Reviewed on: 6-19-12
			Updates:
			Recommendation:
			File 3 – Hartley

4 Margaret Irene Blesh (Estate)

Case No. 10CEPR00944

Atty Cooper, Joseph D. (for Petitioner/Administrator Shelby Benson)

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

DOD: 5/11/2006		<p>SHELBY BENSON, Administrator with bond of \$154,000.00, is petitioner.</p> <p>Accounting is waived (see note #2)</p> <p>I & A \$189,531.84</p> <p>Administrator - waives</p> <p>Attorney (statutory) - \$6,685.96</p> <p>Costs - \$1,218.84</p> <p>Distribution, pursuant to intestate succession, is to:</p> <p>Shelby Benson - 1/3</p> <p>Catherine Laurie - 1/3</p> <p>David Blesh - 1/3</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED TO 07/25/12</u></p> <p>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.
Cont. from 052212			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified X		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg X		
<input type="checkbox"/>	Aff.Mail X		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters 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		
		<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>	

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.

5 Manuel R. Gonzales (Estate)

Case No. 11CEPR00865

Atty Bagdasarian, Gary G. (for Richard Gonzales – Son – Administrator – Petitioner)

Report of Sale and Petition for Order Confirming Sale of Real Property

DOD: 9-10-11	RICHARD GONZALES , Son and Administrator with Limited IAEA without bond, is Petitioner.	<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.
	Sale price: \$70,000.00 Overbid: \$74,000.00	
<input type="checkbox"/> Aff.Sub.Wit.	Appraisal: \$73,000.00	
<input checked="" type="checkbox"/> Verified	Property: 3147 N. Gentry Ave. Fresno, CA 93722	
<input type="checkbox"/> Inventory	Publication: Fresno Business Journal	
<input type="checkbox"/> PTC	Buyer: Manuel Ventura Solano	
<input type="checkbox"/> Not.Cred.	Broker: 6% or \$4,200.00 (\$2,100.00 each to C-21 C. Watson Real Estate and Casa Blanca Real Estate Group, Inc.)	
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order	X	
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: skc
		Reviewed on: 6-19-12
		Updates:
		Recommendation:
		File 5 - Gonzales

Petition for Removal of Trustee, Account, and for Appointment of Successor Trustee

		ANDREW CHAFFER , trust beneficiary, is petitioner.	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Minute order 4/9/12: Doug Chaffer is ordered to send 2/11 and 3/11 bank statements to Mr. Streett. Mr. Chaffer is also ordered to send any life insurance information to Mr. Streett.</p> <p>Minute Order 5/14/12: Mr. Streett is appearing via conference call. Matter continued to 6/25/12</p> <p>1. Need proposed order.</p>
		Petitioner states he is the grandson and 1/6 beneficiary under the HARLEY E. CHAFFER TRUST executed May 9, 1991. Petitioner states he does not possess a copy of the Trust. And amendment to the Trust was executed on October 29, 1998.	
Cont. from 121211, 022712, 040912, 051412		Harley E. Chaffer died on March 4, 2011 thereby making the Trust irrevocable.	
	Aff.Sub.Wit.	Petitioner is informed and believes that the successor Trustee is DOUGLAS EDWARD CHAFFER .	
✓	Verified	Petitioner alleges:	
	Inventory	1. The Trustee has violated his duty to inform the beneficiaries and has refused to provide Petitioner with a copy of the Trust, despite written requests.	
	PTC	2. The Trustee has violated his duty to Petitioner as Trustee has failed to ever render an accounting despite written request to do so.	
	Not.Cred.	Wherefore, Petitioner prays for an Order:	
✓	Notice of Hrg	1. Compelling Douglas Edward Chaffer to produce a copy of the Harley E. Chaffer Trust of May 9, 1991 and all amendments to it;	
✓	Aff.Mail	2. Compelling Douglas Edward Chaffer to account fully for all Trust property;	
	Aff.Pub.	3. Removing Douglas Edward Chaffer as Trustee;	
	Sp.Ntc.	4. Appointing a new Trustee as prescribed by the Trust;	
	Pers.Serv.	5. For costs of suit; attorney fees and for such other and further relief as the court deems proper.	
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			<p>Reviewed by: KT / skc</p> <p>Reviewed on: 6/19/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 6 - Chaffer</p>

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

DOD: 11/18/10	BEVERLY T. ADAMS , wife/named	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 05/23/12</u> 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> <p>Reviewed by: JF</p> <p>Reviewed on: 06/19/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7 - Adams</p>
	Executor without bond, is	
	Petitioner.	
Cont. from 052312	Petitioner is a resident of St. Johns, Florida	
<input type="checkbox"/> Aff.Sub.Wit.	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory	Full IAEA – OK	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Will dated 05/17/01	
<input checked="" type="checkbox"/> Aff.Mail	w/ Residence: Clovis	
<input type="checkbox"/> Aff.Pub.	Publication: The Business Journal	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	Estimated Value of the Estate: \$0.00	
<input checked="" type="checkbox"/> Letters	Probate Referee: STEVEN DIEBERT	
<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		

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

Melvin L. Farley DOD: 9-27-99	<p>J. MICHAEL FARLEY is Petitioner.</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>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>Petitioner requests the Court appoint him as trustee of the trust.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</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>
Ruth L. Farley DOD: 11-9-11		
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: 6-19-12
		Updates:
		Recommendation:
		File 9 - Farley

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 <i>at will</i> 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, <i>if necessary</i>. 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>Court Investigator Jennifer Young advised rights on 6-18-12.</u></p>	
DOB: 4-16-20			
Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
Inventory			
PTC			
Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail		W	
Aff.Pub.			
Sp.Ntc.			
<input checked="" type="checkbox"/> Pers.Serv.		W	
<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:</p> <p>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 filed a report on 6-20-12.

Petition for Termination of Guardianship

Age: 8 DOB: 07/09/03	JESSICA ZAMORA, mother, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>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)</p>
	<p>GLORIA DOBBINS, maternal great-grandmother, was appointed as Guardian on 03/29/07. <u>(Personally served on 05/14/12)</u></p> <p>Father: UNKNOWN (DERRICK LAUGHTER per original guardianship petition)</p> <p>Paternal grandparents: UNKNOWN</p> <p>Maternal grandmother: DECEASED Maternal grandfather: DAVID ZAMORA – served by mail on 05/16/12</p> <p>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.</p> <p>Court Investigator Julie Negrete filed a report on 06/18/12.</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		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<p>Reviewed by: JF</p> <p>Reviewed on: 06/19/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13 - Zamora</p>

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; however, 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				
			Reviewed by: skc/JF	
			Reviewed on: 06/19/12	
		Updates:		
		Recommendation:		
		File 14A - Trask		

Age: 7	<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><u>CONTINUED FROM 06/11/12</u> 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. 	
DOB: 01/16/05			
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			
		<p>Reviewed by: JF</p> <p>Reviewed on: 06/19/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 14B - Trask</p>	

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			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
			<p>Reviewed by: JF</p> <p>Reviewed on: 06/19/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 15 - Ables</p>

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

Age: 81		<p align="center"><u>NO TEMPORARY REQUESTED</u></p> <p>CHARLOTTE YOUNG, daughter, is Petitioner and requests appointment as Conservator of the Person with medical consent and dementia powers to administer dementia medications and as Conservator of the Estate without bond. Petitioner also requests that the Court waive the filing of an Inventory & Appraisal and waives accountings as long as the estate meets the requirements of Probate Code § 2628.</p> <p>Estimated Value of the Estate: Annual income: \$18,600.00</p> <p>Voting Rights Affected.</p> <p>Petitioner states that Acie suffers from Alzheimer's disease and is no longer able to manage his finances or personal affairs. He cannot be left alone and requires assistance with all activities of daily living. He is unable to eat, prepare meals, bathe, dress and groom himself, and use the restroom without assistance. He is unable to take his medication or maintain a clean living environment. He doesn't know the date or time and does not recognize familiar people. He cannot handle money transactions or conduct banking transactions, he is susceptible to financial abuse.</p> <p>Court Investigator Jennifer Daniel filed a report on 06/12/12.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator advised rights on 05/31/12.</p> <p>Voting rights affected, need Minute Order.</p> <ol style="list-style-type: none"> Capacity Declaration of Dr. Bebensee does not support the request for dementia powers to administer dementia medications. The declaration does state that Mr. Hopkins has dementia, but is marked N/A regarding administration of dementia medications. If dementia powers to administer medications is still needed, a revised capacity declaration will be needed. Petitioner is requesting appointment without bond and that the court waives the requirement that an Inventory & Appraisal be filed and that Accountings be filed, stating that the estate meets the requirements of Probate Code § 2628; however, Probate Code § 2610 requires that an Inventory & Appraisal be filed within 90 days of appointment. Further, without an Inventory & Appraisal or the first accounting, the Court is unable to determine whether the estate meets the requirements of Probate Code § 2628 to waive further accountings. Based upon the information provided in the Petition, bond should be set at \$20,460.00. <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> Friday, 11/16/2012 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and Friday, 08/16/2013 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>	
DOB: 07/02/30				
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/o
<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			
<input type="checkbox"/>	FTB Notice			
Reviewed by: JF				
Reviewed on: 06/19/12				
Updates:				
Recommendation:				
File 18 - Hopkins				

19 Shannon N. Nutt (CONS/P) Case No. 12CEPR00437

Atty Nutt, Shirley (Pro Per – Mother – Petitioner)

**Petition for Appointment of Probate Conservator of the Person
(Prob. C. 1820, 1821, 2680-2682)**

Age: 37	<p>SHIRLEY NUTT, Mother, is Petitioner and requests appointment as Conservator of the Person with medical consent powers.</p> <p>Voting rights affected</p> <p>A Capacity Declaration was filed 5-14-12.</p> <p>Petitioner states Shannon was assaulted in her home on 2-27-12 by an unknown assailant and has been in a coma since the incident. She is unable to care for herself at this time and needs continued care.</p> <p>Court Investigator Charlotte Bien filed a report on 6-5-12.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Court Investigator advised rights on 5-31-12</u></p> <p><u>Voting rights affected</u> - <u>Need minute order</u></p>
DOB: 12-25-74		
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		
	<p>Reviewed by: skc</p> <p>Reviewed on: 6-19-12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 19 - Nutt</p>	

Petition for Appointment of Temporary Guardian of the Estate (Prob. C. 2250)

Age: 16	GENERAL HEARING 7-16-12		NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 2. Need proof of personal service of Notice of Hearing with a copy of the Petition at least five Court days prior to the hearing on: - Peter Jeffery Garza, Jr. (Minor, age 16) 3. The Court may require bond of \$321,200 pursuant to Cal. Rules of Court 7.207 and Probate Code §2620(c)(4) (every guardian of the estate must furnish bond including a reasonable amount for the cost of recovery), <u>or may require all funds to be deposited to blocked accounts.</u> <i>Note: The bond amount does not include the unknown Allstate funds. The Court may require updated information or estimated estate value at the general hearing.</i>
DOB: 4-11-96	PETER JEFFERY GARZA , Father, is Petitioner and requests appointment as Temporary Guardian of the Estate without bond.		
	Mother: Deceased Paternal Grandfather: Deceased Paternal Grandmother: Manuela Garza Maternal Grandfather: Thomas Sanchez Maternal Grandmother: Deceased Siblings: Jessica Garza and Noemi Garza (both adults)		
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg	X		
<input type="checkbox"/> Aff.Mail			
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.	X		
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
	Estimated value of estate: \$292,000.00 (personal property - life insurance proceeds)		
	Petitioner states the minor's mother was murdered. The minor along with his sisters is beneficiary of various life insurance proceeds, but many of the companies will not pay or communicate with Petitioner until guardianship of the estate is established.		
	Specifically, Sun Life is waiting to pay \$94,000, Fosters is waiting to pay \$198,000, and Allstate is waiting to pay on a retirement fund their mother had in a sum that has yet to be determined. These funds are available to this minor's sisters, but Allstate refuses to even speak to Petitioner without Letters of Temporary Guardianship of the Estate.		
	Petitioner states the funds will go into trust for him until he reaches majority and can manage his own funds.		
Reviewed by: skc			
Reviewed on: 6-20-12			
Updates:			
Recommendation:			
File 20 - Garza			