

(1) First and Status Report of Personal Representative and (2) Petition for Its Settlement (Prob. C. 12200)

DOD: 01/21/10		DOUGLAS J. GEIST , Administrator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 01/21/10 – 09/07/12	
		Accounting - \$361,126.40	
		Beginning POH - \$333,944.84	
		Ending POH - \$93,469.78	
Cont. from		(\$53,969.78 is cash)	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory	Administrator - \$4,839.58 (statutory)	
<input checked="" type="checkbox"/>	PTC	Attorney - \$4,839.58 (statutory)	
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Costs - \$905.35 (for Certified Letters, filing fees, photocopies, postage (53 persons requiring notice))	
<input checked="" type="checkbox"/>	Aff.Mail	w/o	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters	05/20/10	
<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	<p>Petitioner states that the estate is a beneficiary of the Estate of Alice G. Geist, currently being administered in Fresno County. The Estate of Alice G. Geist was a beneficiary of the Estate of Marilyn Alice Geist (San Francisco Superior Court No. PES-07-290788). The Estate of Marilyn Geist was distributed to the beneficiaries in June 2012, however the reserve has not yet been distributed. After the Marilyn Geist and Alice G. Geist estates are closed and all assets distributed, Petitioner will then file a Petition to close this estate.</p> <p>Upon appointment as Administrator, Petitioner posted bond in the amount of \$400,000.00 based on the value of the assets as of 01/21/10. There current cash remaining in the estate is \$53,969.78. Petitioner requests that bond be reduced to \$55,000.00.</p> <p>Petitioner prays for an Order:</p> <ol style="list-style-type: none"> 1. Authorizing the continuation of the administration of this estate; 2. Settling, allowing and approving the First Account; 3. Confirming and approving all acts and proceedings of the Petitioner; 4. Authorizing the payment of costs to Petitioner's attorney in the amount of \$905.35; and 5. Reducing Petitioner's bond to \$55,000.00. 	

Reviewed by: JF
Reviewed on: 06/28/13
Updates:
Recommendation:
File 1 – Geist

Petition Requesting Transfer of After Discovered Real Property to Decedent's Beneficiaries Fees [Prob. C. 11642)(a)]

DOD: 6/26/2010		THOMAS JAMES SNYDER , Executor of the Will, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Petitioner states he was appointed Executor on 8/24/2010. A final Order granted Executor's request to distributed the property remaining in the estate to all the beneficiaries named in Decedent's Will.	1. Petitioner was discharged as Executor of the estate on 8/13/2011. Therefore, it appears that pursuant to Probate Code §12252 Petitioner will need to be reappointed as Executor of the estate for the court to make an order for distribution of the after discovered property.
Cont. from			
	Aff.Sub.Wit.	The final order also included an omnibus clause allowing all after discovered property to be distributed to the Decedent's heirs without need to reopen the probate estate.	2. Need Order. Local Rule 7.1 states a proposed Order shall be submitted with all pleadings that request relief. If the proposed order is not received in the Probate Filing Clerk's Office ten (10) days before the scheduled hearing, a continuance may be required.
✓	Verified		
	Inventory	After termination of the estate and discharge of the executor it was discovered that the Decedent held and interest in a timeshare vacation property in Southern California.	
	PTC		
	Not.Cred.	Wherefore Petitioner requests pursuant to the provisions of the final order and specifically the omnibus clause the Court order distribution of the real property be distributed to:	
✓	Notice of Hrg		
✓	Aff.Mail	Thomas James Snyder Laurel Ann [Liefert] Snyder Mark Robert Snyder Carolyn Lee Snyder	
	Aff.Pub.		
	Sp.Ntc.	Inventory and Appraisal filed on 6/24/2013 shows the value of the after discovered property as \$5,000.00.	
	Pers.Serv.		
	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: 7/1/2013
			Updates:
			Recommendation:
			File 2 – Snyder

(1) First and Final Account and Report of Administrator and (2) Petition for Its Settlement, for (3) Allowance of Attorney Fees and for (4) Final Distribution (Prob. C. 1060 et seq., 11640 & 10810)

DOD: 3/1/2010	DEBRA ELLEN AVEDISIAN , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 3/1/2010 – 5/20/2013	
Cont. from	Accounting - \$100,073.39	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$ 95,000.00	
<input checked="" type="checkbox"/> Verified	Ending POH - \$ 92,921.39	
<input checked="" type="checkbox"/> Inventory	Administrator - waives	
<input checked="" type="checkbox"/> PTC	Administrator costs - \$2,115.50 (filing fee, publication, probate referee and costs associated with sale of real property)	
<input checked="" type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail W/	Attorney - \$4,002.21 (statutory)	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.	Closing - \$1,000.00	
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	Distribution, pursuant to intestate succession and assignment of interest, is to:	
<input checked="" type="checkbox"/> Letters 1/31/11	Debra Ellen Avedisian - \$59,876.99	
<input type="checkbox"/> Duties/Supp	Kevin James Watson - \$25,926.69	
<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: KT
		Reviewed on: 7/1/2013
		Updates:
		Recommendation: SUBMITTED
		File 3 – Ross

**Petition for Beneficiary to Appoint Successor Trustee Upon Vacancy; Accounting
 by Prior Trustee; Fixing Successor Trustee's Compensation for Payment of
 Attorney's Fees and Reimbursement of Costs Advanced**

Age:		NEEDS/PROBLEMS/COMMENTS: <p style="text-align: center;"><u>OFF CALENDAR</u> Order signed 5-21-13</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: 7-1-13
		Updates:
		Recommendation:
		File 4 – Bailey

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 08/14/2011	MALER ALI TAREB , son is petitioner and nominates WALID ALI TAREB as administrator without bond.	<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"> • Friday, 12/06/2013 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Friday, 09/05/2014 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>
Cont. from	WALID ALI TAREB was appointed Special Administrator on 05/24/2013 to have authority to execute the following documents in connection with any modification of the first trust deed in favor of Wells Fargo Bank for the deed of trust secured by real property located at 3638 S. Winery Ave. Fresno, Ca. 93725:	
<input type="checkbox"/> Aff.Sub.Wit.	<ul style="list-style-type: none"> • Bank Loan Assumption • Request for Modification of Affidavit RMA • Credit Check Authorizations • IRS Form 4506T • Trial Plan and Modification Agreements • Third Party Authorizations 	
<input checked="" type="checkbox"/> Verified	Limited Authority – o.k.	
<input type="checkbox"/> Inventory	Decedent died intestate.	
<input type="checkbox"/> PTC	Residence: Fresno	
<input type="checkbox"/> Not.Cred.	Publication: The Business Journal	
<input checked="" type="checkbox"/> Notice of Hrg	Estimated value of the Estate:	
<input checked="" type="checkbox"/> Aff.Mail w/	Real Property (-\$40,000.00)	
<input checked="" type="checkbox"/> Aff.Pub.	Probate Referee: Steven Diebert	
<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		
		Reviewed by: LV
		Reviewed on: 06/28/2013
		Updates:
		Recommendation: Submitted
		File 5 – Tareb

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

DOD: 04/11/2013		<p>HARRY H. DOUGHERTY, JR., MARYILYN MCCLENDON, LINDA ASHWORTH, ROBERT H. DOUGHERTY, children are petitioners.</p> <p>40 days since DOD.</p> <p>No other proceedings.</p> <p>I&A - \$76,500.00</p> <p>Will dated: 12/10/2008 – devises all property to decedent's children in equal shares.</p> <p>Petitioner requests Court determination that decedent's 100% interest in real property located at 1030 N. Fruit, Fresno, Ca. and miscellaneous personal property including furniture, clothing, personal effects and tools pass ¼ to Harry H. Dougherty, ¼ to Marilyn McClendon, ¼ Linda Ashworth, and ¼ to Robert H. Dougherty pursuant to decedent's will.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" 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 type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: LV	
		Reviewed on: 07/01/2013	
		Updates:	
		Recommendation: Submitted	
		File 6 – Dougherty	

DOD: 03/31/2008		MARY ELLEN MASON and EDWARD ALVIN BEIER , children are petitioners.	NEEDS/PROBLEMS/COMMENTS:
		40 days since DOD.	
Cont. from		No other proceedings.	
	Aff.Sub.Wit.		
✓	Verified	I&A - \$85,000.00	
✓	Inventory	Will dated: 06/16/1982 – devises all property to decedent's children in equal shares.	
	PTC		
	Not.Cred.		
✓	Notice of Hrg	Petitioner requests Court determination that decedent's 100% interest in real property located at 1317 W. Cortland, Fresno, Ca. ½ to Mary Ellen Mason, and ½ to Edward Alvin Beier pursuant to decedent's will.	
✓	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 by: LV
			Reviewed on: 07/01/2013
			Updates:
			Recommendation: Submitted
			File 7 – Beier

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 10/27/2012	FRANK HANSEN , son, is petitioner and requests appointment as Administrator with bond set at \$15,000.00 and all funds in excess of \$15,000.00 placed into a blocked account.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> #5a(3) or 5a(4) of the petition was not answered re: registered domestic partner. #5a(7) or 5a(8) of the petition was not answered re: issue of predeceased child. #5b of the petition was not answered re: step or foster child. #8 of the Petition does not include the name and date of death of the decedent's spouse as required by Local Rule 7.1.1D. Petition states the decedent's estate consists of personal property only, with an approximate value of \$200,000.00. Competing petitioner, Karen Hansen's Petition states the decedent's estate consists of personal property valued at \$25,000.00 and real property valued at approximately \$150,000.00. Need clarification. Note: If the estate does consist of real property then the estate must be bonded for the entire value of the real property since full IAEA authority is granted. If the Court grants limited IAEA authority then bond can be set for the value of the personal property only.
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.	Full IAEA – o.k.	
<input checked="" type="checkbox"/> Verified	Decedent died intestate.	
<input type="checkbox"/> Inventory	Residence: Coalinga	
<input type="checkbox"/> PTC	Publication: Fresno Business Journal	
<input type="checkbox"/> Not.Cred.		
<input 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	Estimated value of the estate:	
<input checked="" type="checkbox"/> Letters	Personal property - \$200,000.00	
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections	Probate Referee: Rick Smith	
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 7/1/2013
		Updates:
		Recommendation:
		File 8A – Hansen

NEEDS/PROBLEMS/COMMENTS (cont.):

1. #8 of the petition lists one of decedent's children as Ed Bewley. Competing Petitioner, Karen Hansen's petition lists an Edson Beasley III. Need clarification as to the correct name of the decedent's son. **Note:** Notice was sent to Ed Bewley. Therefore, if the beneficiary's name is not Ed Bewley, notice would be deficient.
6. #8 of the petition lists one of decedent's children as Christine Ehrsam. Competing Petitioner, Karen Hanson's petition lists her as Christine Ehrsan. Need clarification as to correct spelling of Christine's last name. **Note:** Notice was sent to Christine Ehrsam. Therefore, if the beneficiary's name is not Christine Ehrsam, notice would be deficient

Note: If the petition is granted, status hearings will be set as follows:

- **Friday, August 2, 2013** at 9:00 a.m. in Department 303, for the filing of the bond and/or Receipt for Blocked Account.
- **Friday, December 6, 2013** at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.
- **Friday, September 5, 2014** at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 10/27/2012	KAREN HANSEN , daughter, is petitioner and requests appointment as Administrator with bond set at \$175,000.00.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>2. #8 of the petition lists one of decedent's children as Edson Beasley III. Competing Petitioner, Frank Hansen's petition lists an Ed Bewley. Need clarification as to the correct name of the decedent's son. Note: Notice was sent to Frank Beasley, III. Therefore, if the beneficiary's name is not Frank Beasley, III, notice would be deficient.</p> <p>3. #8 of the petition lists one of decedent's children as Christine Ehrsan. Competing Petitioner, Frank Hanson's petition lists her as Christine Ehrsam. Need clarification as to correct spelling of Christine's last name. Note: Notice was sent to Christine Ehrsan. Therefore, if the beneficiary's name is not Christine Ehrsan, notice would be deficient.</p> <p>Please see additional page</p>
Cont. from	Full IAEA – o.k.	
<input type="checkbox"/> Aff.Sub.Wit.	Decedent died intestate.	
<input checked="" type="checkbox"/> Verified	Residence: Coalinga	
<input type="checkbox"/> Inventory	Publication: Fresno Business Journal	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail		
<input checked="" type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	Estimated value of the estate:	
<input checked="" type="checkbox"/> Letters	Personal property - \$ 25,000.00	
<input checked="" type="checkbox"/> Duties/Supp	Real property - \$ 150,000.00	
<input type="checkbox"/> Objections	Probate Referee: Rick Smith	
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 7/1/2013
		Updates:
		Recommendation:
		File 8B – Hansen

Note: If the petition is granted, status hearings will be set as follows:

- **Friday, August 2, 2013** at 9:00 a.m. in Department 303, for the filing of the bond.
- **Friday, December 6, 2013** at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.
- **Friday, September 5, 2014** at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

Dept. 303, 9:00 a.m. Wednesday, July 3, 2013

Atty Kruthers, Heather H., of County Counsel's Office (for Petitioner Public Guardian)
 Atty Sanoian, Joanne (Court-appointed for Conservatee)

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

Age: 78 years		<p align="center">TEMPORARY GRANTED EX PARTE; EXPIRES 06/05/13; EXTENDED TO 7/3/2013</p> <p>PUBLIC GUARDIAN is Petitioner and requests appointment as Conservator of the Person with medical consent and dementia powers for administration of dementia medications and for placement in a secured-perimeter facility, and requests appointment as Conservator of the Estate without bond.</p> <p>Estimated Value of the Estate: Personal property - \$ 61,019.09 Annual income - \$ 43,968.00 Total - \$104,987.09</p> <p>Voting Rights Affected.</p> <p>Capacity Declaration of Constantine Phiripes, M.D., filed 5/28/2013.</p> <p>Petitioner states:</p> <ul style="list-style-type: none"> Proposed Conservatee came to the attention of the Petitioner through a referral from Adult Protective Services who had been contacted by the proposed Conservatee's bank, after having become suspicious of wrongful activity when bank staff noticed large amounts of cash of over \$130,000.00 being spent in a year's time; Proposed Conservatee suffers from diabetes and needs reminders to take her medications, and during the time proposed Conservatee's daughter, BRENDA SEARS, went on vacation for 3 weeks, the proposed Conservatee was left alone and did not reliably eat or take her medication; <p align="center"><i>~Please see additional page~</i></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator Advised Rights on 6/19/2013.</p> <p>Voting Rights Affected – Need Minute Order.</p> <p>Note for background: <i>Minute Order</i> dated 6/5/2013 from the hearing on the petition for appointment of temporary conservator states, in pertinent part: Ms. Sanoian objects to the Petition and the movement of Ms. Cannon. The Court authorizes the Public Guardian to bring in an agency for the purpose of seeing that Ms. Cannon's medication situation is stabilized. The Court orders that Ms. Cannon not be moved pending the general hearing. The Court further orders that any power of attorney be suspended for the period of the temporary.</p> <p>Note: <i>Ex Parte Order Authoring Conservator to Move Conservatee</i> filed on 6/27/2013 authorized the Public Guardian as Temporary Conservator to immediately move Ms. Cannon to Fairwinds Senior Facility.</p>	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			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 checked="" type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p>Reviewed by: LEG</p> <p>Reviewed on: 7/1/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 9 – Cannon</p>		

Petitioner states, continued:

- A conservatorship is necessary for assuring proposed Conservatee's health and safety, as her daughter, and son, **MARK CANNON**, who it is reported lives in her house, have not provided proper supervision of her;
- It is reported that proposed Conservatee's daughter added her name to proposed Conservatee's checking account, and it appears the proposed Conservatee has been the victim of financial elder abuse by at least her daughter;
- Conservatorship is the only means by which proposed Conservatee's safety can be assured and her assets protected from being further depleted.

Court Investigator Charlotte Bien's Report was filed on 6/25/2013.

Note: If petition is granted, Court will set status hearings as follows:

- **Friday, November 8, 2013 at 9:00 a.m. in Dept. 303** for filing of inventory and appraisal; and
- **Friday, September 5, 2014 at 9:00 a.m. in Dept. 303** for filing of the first account.

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.

Dept. 303, 9:00 a.m. Wednesday, July 3, 2013

(1) Third Account and Report of Conservator and (2) Petition for Its Settlement

Age: 21 years	TIM COLLINS , father/conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 4/1/12 – 4/23/13	
	Accounting - \$174,545.21	
	Beginning POH- \$164,743.64	
	Ending POH - \$141,978.50	
	(\$18,146.06 is cash)	
Cont. from	Current bond: \$61,000.00	Please see additional page.
<input type="checkbox"/> Aff.Sub.Wit.	Conservator - allowed \$500.00 per month per court order dated \$3/21/13.	
<input checked="" type="checkbox"/> Verified	Petitioner prays for an Order:	
<input type="checkbox"/> Inventory	1. Settling and allowing the 3 rd account;	
<input type="checkbox"/> PTC	2. Approving and confirming the acts of the petitioner as Conservator of the person and estate.	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail W/		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 2620(c)		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 7/1/2013
		Updates:
		Recommendation:
		File 11 – Collins

NEEDS/PROBLEMS/COMMENTS:

1. Disbursement schedule includes items that may require clarification.

- 4/23/12 – GB3 gym membership (3 years) for \$442.00 – why did the conservatee need a 3 year gym membership? Was this the best use of his funds or would a membership with a shorter term be more practical?
- 7/2/12 – Paralegal assistance 2nd account - \$400.00
1/13/13 – Paralegal assistance/typing fee - \$250.00
Note: Only a Conservator and/or his or her attorney, if any, are entitled to compensation from the estate a paralegal/typing service is not an attorney and is not entitled to payment from the estate as an attorney would be. Petitioner is self-represented and as such is responsible for the document preparation costs that he obtained. Further, any compensation related to the conservatorship estate requires petition and allowance by the Court prior to payment. See Probate Code §2647.
- 7/2/12 - Verizon/new phone and accessories - \$173.44
12/21/12 – Verizon/new iPhone - \$198.88 – court may require clarification as to why the conservatee needed a new phone twice in six months.
- Various dates – daily allowance \$100 per month (however 2 months were \$150 and one month was \$200).
Note: California Rules of Court, Rule 7.1054 (b)(16) states the conservator of the estate must evaluate the conservatee's ability to manage cash or other assets and take appropriate action, including obtaining prior court approval when necessary or appropriate, to enable to conservatee to do so to the level of his ability.
- 8/23/12 – Ace Glass /Front door damages - \$699.90
- 9/17/12 – Dorie Collins/Naskin Inv/Reim - \$263.89
– Need clarification. Probate Code §1064(a)(2) a petition for approval of an accounting shall include a statement of any unusual items appearing in the account.
- 12/1/12 – Angelica Cloud/grandma's gift - \$60.00 - California Rules of Court, Rule 7.1054(b)(3) states the conservator of the estate must refrain from making loans or gifts of estate property except as authorized by the court after full disclosure.
- 1/14/13 – Cash/allowance/birthday dinner - \$300.00 – why is the Conservatee paying for his own birthday dinner celebration?
- 4/23/13 – Fresno Superior Court/Court Investigator Fees - \$375.00 – Court records show that the court investigator fees paid was \$350.00 in addition the cancelled check attached to the accounting shows payment of \$350.00.
- 3/21/13 – Tim Collins Compensation \$6,000.00
4/3/13/13 – Tim Collins court ordered compensation - \$6,000.00 **Note:** On 3/21/13 the court allowed Mr. Collins to pay himself \$500.00 per month as compensation for services rendered as conservator. This amount was not retroactive to the beginning of the conservatorship. Therefore it appears Mr. Collins should not have paid himself this amount and should be only be paying himself the \$500 each month.

Please see additional page

NEEDS/PROBLEMS/COMMENTS (Cont.):

- 2. Receipt Schedule includes rent for the Condo.** Declaration of filed 2/7/2013 states the condo is rented for \$850.00 per month and has since increased to \$895.00 per month. When the current lease is up the rent will increase to \$1,020.00 per month. However the receipt schedule shows receipts for rent varying from \$139.55 to \$903.50 with an average monthly rent of \$748.00. The court may require clarification. Note: If there are expenses to the rental property they should be listed in the disbursement schedule.

Age: 14	<p>VENTURA and JULIETA ROMERO, Guardians, are Petitioners.</p> <p>Petitioners were appointed Guardians on 9-29-10.</p> <p>Father: Unknown (<i>Diligence found 9-29-10</i>) Mother: Gina Romero (<i>Served by mail 6-5-13</i>)</p> <p>Paternal Grandfather: Unknown Paternal Grandmother: Unknown</p> <p>Maternal Grandfather: Deceased Maternal Grandmother: Jesse Romero (<i>Served by mail 6-5-13</i>)</p> <p>Note: Petitioners filed the Petition for Termination of Guardianship <i>ex parte</i> on 5-31-13. The Court ordered the petition be set for hearing on 7-3-13 with notice as appropriate pursuant to Probate Code § 1460(b)(5) and investigation. The order was mailed to Petitioners on 6-4-13.</p> <p>Petitioners state the minor has exhibited behavior that continues to get worse. Petitioners have sought out Fresno County Children's Mental Health to assess the situation, but there has been no improvement. Petitioners want to be released from the guardianship as the child is out of control and they feel they cannot continue their duties. The minor has threatened Petitioners and their children and they are in fear.</p> <p>Court Investigator Samantha Henson filed a report on 6-26-13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of service of Notice of Hearing on minor Alexander Romero (age 14).</p>
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<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
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<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
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<input type="checkbox"/> FTB Notice		
		Reviewed on: 7-1-13
		Updates:
		Recommendation:
		File 12 – Romero

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

DOD: 01/28/2013		<p>LUPE GALINDO, niece/named executor without bond, is petitioner. (? Please see note #4)</p> <p>Full IAEA - ?</p> <p>Will dated: 02/08/2001</p> <p>Residence: Kerman Publication: Need</p> <p>Estimated value of the Estate:</p> <table> <tr> <td>Personal Property</td> <td>-</td> <td>\$105,878.00</td> </tr> <tr> <td>Real property</td> <td>-</td> <td>\$105,878.00</td> </tr> <tr> <td>Total:</td> <td>-</td> <td>\$105,878.00</td> </tr> </table> <p>Probate Referee: Steven Diebert</p>	Personal Property	-	\$105,878.00	Real property	-	\$105,878.00	Total:	-	\$105,878.00	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Affidavit of Publication. 2. Need Notice of Petition to Administer Estate. 3. Need proof of service of Notice of Petition to Administer Estate on the following: <ul style="list-style-type: none"> • Juan Samora • Manuel Samora • Senon Samora • Mary Martinez • Lupe Garcia 4. Decedent's will lists the named executor as Lupe Garcia. It is unclear if Lupe Garcia and Lupe Galindo, petitioner, are the same person. Please clarify. 5. Each person named in the will must be listed on Section 8 of the petition. 6. Need Confidential Supplement to Duties & Liabilities of Personal Representative. 7. Petition lists the real property, personal property and the total estimated value of the estate at \$105,878.00. Please clarify. <p style="text-align: center;"><u>Please see additional page</u></p>
Personal Property	-		\$105,878.00									
Real property	-		\$105,878.00									
Total:	-		\$105,878.00									
Cont. from												
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<input type="checkbox"/>	UCCJEA											
<input type="checkbox"/>	Citation											
<input type="checkbox"/>	FTB Notice											
			<p>Reviewed by: LV</p> <p>Reviewed on: 07/01/2013</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13 – Samora</p>									

Note: If the petition is granted status hearings will be set as follows:

- **Friday, 12/06/2013 at 9:00a.m. in Dept. 303** for the filing of the inventory and appraisal **and**
- **Friday, 09/05/2014 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.

Dept. 303, 9:00 a.m. Wednesday, July 3, 2013

Petition for Appointment of Temporary Guardian of the Person

Age: 3 months		<u>GENERAL HEARING 08/21/2013</u>		NEEDS/PROBLEMS/COMMENTS:		
		<p>TYLER GAROLD MACKEY, uncle, and PAMELA JEAN MACKEY, adopted grandmother, are petitioners.</p> <p>Father: UNKNOWN</p> <p>Mother: KRISTOL ANN MACKEY</p> <p>Paternal Grandparents: Not Listed</p> <p>Maternal Grandfather: Lary Ekron Maternal Grandmother: Kristine Greeson</p> <p>Petitioners states: mother is addicted to drugs and in violation of probation. Mother's living conditions and drug use places the child in danger. Fresno Police Department and Child Protective Services advised petitioners to seek guardianship of the child. Mother has failed 2 rehab programs in 3 weeks and is back on drugs.</p>		<p>1. Need Notice of Hearing.</p> <p>2. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:</p> <ul style="list-style-type: none"> • Father (Unknown) • Kristol Ann Mackey (Mother) 		
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		Reviewed by: LV				
		Reviewed on: 07/02/2013				
		Updates:				
		Recommendation:				
		File 14 – Mackey				