

1A Wayne Eugene Amey (CONS/P)

Case No. 0292259

Petitioner LaPitcherette Joyce Seward (Pro Per Petitioner)

Petition for Appointment as Probate Conservator of the Person (Prob. Code §1820)

	See petition for details.		<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p><u>Note:</u> Page B is a competing petition filed by Felita Mayberry, another sister.</p> <p>Court Investigator advised rights on 6/12/15.</p> <p>Voting rights affected – need minute order.</p> <ol style="list-style-type: none"> 1. Notice of Hearing filed 6/24/15 indicates service on CVRC on 6/24/15 without a copy of the petition. Probate Code §1822(e) requires 30 days' notice with a copy of the petition. 2. The Capacity Declaration signed by Constantine Phiripes, MD, on 6/15/15 (filed 6/19/15) does not contain the doctor's initials at #7b re lack of capacity for medical consent powers.
	Cont. from 062315		
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
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✓	Pers.Serv.	W	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
✓	Video Receipt		
✓	CI Report		
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✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	Citation		
	FTB Notice		
			<p>Reviewed by: skc</p> <p>Reviewed on: 7/7/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1A - Amey</p>

1A

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 6/12/15. Voting rights affected – need minute order. 1. See Page A for issue regarding Capacity Declaration.	
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	Inventory			
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	Objections			
✓	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
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	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 7/7/15	
			Updates:	
			Recommendation:	
			File 1B - Amey	

Conservator: Albert Franco (pro per)

Conservator: Patricia Leonard (pro per)

Probate Status Hearing Re: Filing of the Third Account

DOD: 8/15/13	ALBERT FRANCO and PATRICIA LEONARD are conservators of the person and estate.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 5/7/15. Minute order states the Court directs that a Third Account is required. If the petition is filed, the status hearing on 7/9/15 will come off calendar. However, Parties are ordered to be personally present in Court or appear via Court Call on 7/9/15 if the hearing remains on calendar. As of 7/6/15 the Third Account has not been filed.</p>
	Order approving second account and report was approved on 2/21/13.	
	Property on hand at the end of the second account included real property and cash in the sum of \$2,518.86.	
Cont. from 042415, 050715	Minute order dated 2/21/13 set this status hearing for the filing of the third account.	
Aff.Sub.Wit.	<p>Notice of Unavailability of Conservators filed on 4/21/15 states the conservators are unable to attend the hearing on 4/24/15. If another hearing is required to close the case after notice of the conservatee's demise Mr. Franco (conservator) requests the court let him know.</p> <p>Mr. Franco states the conservatee died on 8/15/13. Mr. Franco apologizes for waiting on the Notice of her demise but he was trying to figure out what needed to be done next and didn't have the funds to hire an attorney.</p> <p>Mr. Franco states it is his understanding that the conservatorship ended with the conservatee's death but the court still has jurisdiction for a final accounting, if necessary. Mr. Franco humbly requests that the court find it is not necessary and, based on the Second Account current which was approved on 2/21/13, close this case.</p> <p>There is no will and Mr. Franco and his sister are the only heirs to the remaining assets of this estate which is still essentially his mother's house. They are prepared and willing to open a new probate case to complete the disposition of his mother's estate.</p>	
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Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<p>Reviewed by: KT</p> <p>Reviewed on: 7/6/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 2 - Kozera</p>

DOD: 4-3-99	<p>ANTHONY M. MARTINEZ, Son, was appointed Administrator with Full IAEA without bond on 11-2-10. Letters issued on 2-15-11.</p> <p>I&A filed 2-15-11 indicated a final estate value of \$19,000.00 consisting of a one-third interest in real property.</p> <p>Corrected I&A filed 9-22-11 indicated a corrected value of \$57,000.00 for the one-third interest in real property.</p> <p>A Request for Special Notice was filed on 8-18-11 by Attorney James Mele, attorney for beneficiary Nick M. Martinez.</p> <p>Another Request for Special Notice was filed 10-31-13 by beneficiary Nick M. Martinez, in pro per, as well as an Objection to any proposed action taken by Administrator Anthony M. Martinez.</p> <p>On 10-31-13, upon review of the file, the Court set this status hearing for failure to file a first account or petition for final distribution. Notice was mailed to Attorney Robert Howk on 10-31-13.</p> <p>Minute Order from status hearing on 01/03/14 relieved Mr. Howl as counsel and appointed the Public Administrator as Successor Administrator. Letters of Administration were issued to the Public Administrator on 06/23/14.</p> <p>Status Report of Public Administrator regarding Failure to File Final Account and Sale of Real Property filed 7/7/15 states the real property located at 824 Pucheu Street in Mendota has been sold. The PA located another piece of property owned by Tony Martinez and two other individuals that are deceased. The supplemental appraisal for the 1/3 interest valued at \$6,667.00 was filed 4/6/15. It is still on the market at this time. The PA respectfully requests that the next status hearing be set no sooner than four (4) months from the date of this hearing to allow time to sell the real property and file the final account.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need final account/petition for final distribution.</p>
Cont. from 010314, 40414, 101014		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>Reviewed by: skc</p> <p>Reviewed on: 7/6/15</p> <p>Updates: 7/7/15</p> <p>Recommendation:</p> <p>File 3 – Martinez</p>	

Status Hearing Re: Filing of the Second Account

Age: 97	<p>DIANE FRATIS, daughter, was appointed as Conservator of the Person and Estate with bond set at \$209,000.00 on 02/17/12. Letters were issued on 03/06/12.</p> <p>Conservator's First Account was approved on 05/22/13. Minute Order from 05/22/13 set this matter for a status hearing regarding filing of the Second Account.</p> <p>Status Report filed 07/07/15 states: the second account current is being finalized at this time. The attorney's paralegal is on vacation for two weeks and was not able to complete the accounting before she left. Further, they have received additional information from the client and are still verifying account balances at this time. The second account should be filed within the next 3-4 weeks. A 60 day continuance is requested.</p> <p>In addition, a Petition for Withdrawal of Funds from a Blocked Account to withdraw additional funds necessary to pay expenses of the conservatee for the next few months was filed on 07/07/15. It is anticipated that additional funds will be released upon the approval of the second account.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 06/04/15</u></p> <p>1. Need Second Account current.</p>
Cont. from 041715		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
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Objections		
Video Receipt		
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9202		
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Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 07/07/15
		Updates:
		Recommendation:
		File 4 - Fratis

Probate Status Hearing Re: Filing 2nd Account

		<p>CHRISTINA TOLMAN, Daughter, is Conservator.</p> <p>Pursuant to Order Settling Conservator's First Account filed 7/17/14, the Second account is due 5/14/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Second Account filed 6/26/15 is set for hearing on 8/10/15.</p>
Cont from 051415, 061115			
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			
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Status Rpt			
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Citation			
FTB Notice			
		Reviewed by: skc	
		Reviewed on: 7/6/15	
		Updates:	
		Recommendation:	
		File 5 - Tolman	

DOD: 07/04/12		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u> First & Final Account and Report of Executor filed 07/06/15 and set for hearing on 08/12/15</p>
Cont. from 053014, 063014, 073014, 091714, 011515, 022615, 042315, 060415		
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: JF
		Reviewed on: 07/07/15
		Updates:
		Recommendation:
		File 6 - Shiba

DOD: 11/26/12	<p>BETTY PHILLIPS and ROSE LEE LITTLE, sisters, were appointed Co-Executors with full IAEA and without bond on 06/11/13. Letters Testamentary were issued on 06/11/13.</p> <p>Inventory & Appraisal, partial no. 1, filed 02/13/14 - \$615,000.00</p> <p>Inventory & Appraisal, final, filed 07/17/14 - \$63,096.95</p> <p>Status Report filed 07/06/15 states: a request for default judgment against Karlie Steinhauer and Jamie Rust, defendants in the civil action Phillips and Little vs. Steinhauer and Rust was filed on 05/26/15. A judgment against Steinhauer and Rust is necessary for inclusion as an asset of this Estate. As of 07/05/15, Petitioner is still waiting for a Judgment to be entered by the Court. The Judgment is in excess of \$56,000.00. Upon entry of the judgment against Steinhauer and Rust, it is believed that the estate will be in a condition to be closed.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 06/24/15 Minute Order from 06/24/15 states: Counsel represents that he is waiting for the default judgment that he filed on 05/26/15 to be processed by the Civil Department.</p> <p>1. Need Account/Report on Waiver of Account and Petition for Final Distribution <u>and/or</u> current written status report.</p>
Cont. from 080814, 102314, 012115, 042215, 062415		
Aff.Sub.Wit.		
Verified		
Inventory		
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Notice of Hrg		
Aff.Mail		
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Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 07/07/15
		Updates:
		Recommendation:
		File 7 – Kiramidjian

DOD: 08/21/2012	GILDA N. WALKER , daughter, was appointed Administrator with Limited IAEA authority without bond on 08/16/2013. \$75,700.00 ordered to be placed in a Blocked account.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 091914, 100214, 010815, 040215	Letters issued on 08/30/2013.	OFF CALENDAR First Account and Final Distribution filed 07/06/2015. Hearing is set for 08/12/2015.
Aff.Sub.Wit.	Receipt for Blocked account in the amount of \$75,700.00 was filed on 09/24/2013.	Minute Order of 01/08/2015: The Court needs information regarding the amounts of the offers that have been made on the real property.
Verified	Inventory & Appraisal filed 10/30/2013 showing a value of \$191,350.00.	1. Need First Account or Petition for Final Distribution.
Inventory	Minute Order of 07/18/2013 set this status hearing for the filing of the First Account and/or Petition for Final Distribution.	Reviewed by: LV
PTC	Status Report filed 03/18/2015 states on 02/06/2015, a new Probate Listing Agreement was executed by the Administratrix with Masiello Real Estate. On 02/06/2015, an off for \$107,000.00 was received from EVC Homes, LLC, along with a \$1,000.00 deposit. On 02/09/2015, the Seller presented a Counter Offer as to certain of the terms of sale which was accepted by the buyer on 02/11/2015. On or about 03/03/2015, an escrow was opened at Chicago Title Company. A reappraisal for Sale was prepared and mailed to the Administratrix for signature on 03/05/2015. The Administratrix has limited authority for the sale of the real property. A Report of Sale and Petition for Order confirming Sale will be filed and set for hearing, and a Notice of Sale will be published. When the Court has issued an Order Confirming Sale, the escrow will proceed to closing. A 60 day continuance is requested to allow time for the hearing on the Report of Sale, and the closing of escrow.	Reviewed on: 07/07/2015
Not.Cred.		Updates:
Notice of Hrg		Recommendation:
Aff.Mail		File 8 - Miles
Aff.Pub.		
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Citation		
FTB Notice		

Attorney Winter, Gary L. (for Petitioner Richard Bennett, Administrator)

First and Final Account and Report of Administrator and Petition for: (1) Its Settlement, (2) for Allowance of Compensation to Attorneys for Ordinary Services, (3) Compensation to Attorneys for Extraordinary Services, and (4) for Final Distribution

DOD: 8/23/2012		RICHARD BENNETT , Creditor and Administrator appointed with Limited IAEA authority without bond on 2/5/2014, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Page 9B is the Report of Sale.</p> <p>1. Need proposed order pursuant to Local Rule 7.1.1(F) providing that a proposed order shall be submitted with all pleadings that request relief.</p> <p>Note: Order for Allowance of Creditor's Claim of Personal Representative filed 7/25/2014 finds Petitioner's Creditor's Claim is allowed in the cumulative amount of \$88,939.03, with specified amounts for the items comprising that total.</p>
Cont. from 050415		Account period: 8/23/2012 – 3/16/2015	
<input type="checkbox"/>	Aff.Sub.Wit.	Accounting - \$72,500.00	
<input checked="" type="checkbox"/>	Verified	Beginning POH - \$72,500.00	
<input checked="" type="checkbox"/>	Inventory	Ending POH - \$72,500.00 <i>(real property)</i>	
<input checked="" type="checkbox"/>	PTC	Administrator - waives	
<input checked="" type="checkbox"/>	Not.Cred.	Attorney - \$2,900.00 <i>(statutory)</i>	
<input checked="" type="checkbox"/>	Notice of Hrg	Attorney XO - \$4,266.00 <i>(for services to Petitioner in capacity as creditor @ \$2,385.00; sale of real property @ \$1,881.00; per Declaration attached as Exhibit A;)</i>	
<input checked="" type="checkbox"/>	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters 020614		
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<input checked="" type="checkbox"/>	9202		
	Order	X	
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	UCCJEA		
	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
<p>Petitioner states:</p> <ul style="list-style-type: none"> An ancillary administration of Decedent's estate was completed in Broward County, Florida; Concurrent with the Petition, the sole asset of the estate consisting of a 50% interest in real property located on Tollhouse Road in Fresno County has been proposed to be sold during administration of this estate; Petitioner is the only party to have properly filed and served a formal claim against the estate; Petitioner's claim of \$99,939.03 was filed on 6/25/2014, and approved in the sum of \$88,939.03 by this Court by Order signed on 7/25/2014; <p>~Please see additional page~</p>			
Reviewed by: LEG			
Reviewed on: 7/7/15			
Updates:			
Recommendation:			
File 9A - Clendenning			

Petitioner states, continued:

- Petitioner's claim has yet to be paid; however, Petitioner has agreed to release his entire claim against the estate in exchange for the estate's **50%** interest in real property on Tollhouse Road, of which Petitioner is already the owner of the remaining **50%** interest; the estate's interest has been valued at **\$72,500.00**;
- The estate is insolvent as the cumulative value of the claims against the estate exceed the value of the estate;
- Petitioner has filed concurrently with the Petition a petition for order confirming sale of real property to himself in exchange for release of his claim against the estate, which is the only claim filed.

Petitioner requests this Court order that:

1. First and Final account of Petitioner as administrator is settled, allowed and approved;
2. All acts and proceedings of Petitioner as administrator set forth in the petition are confirmed and approved;
3. Petitioner is authorized to pay the Attorney ordinary fees and extraordinary fees for services rendered; and
4. Distribution of any other property of the Decedent not now known or discovered is made to the persons entitled to it; and
5. On the filing of receipts *[and approval of an Ex Parte Petition for Final Discharge and Order]*, Petitioner is discharged and released from all liability *[as personal representative.]*

Attorney Winter, Gary L. (for Petitioner Richard Bennett, Administrator)

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

DOD: 8/23/2012	RICHARD BENNETT , Creditor and Administrator appointed with Limited IAEA authority without bond on 2/5/2014, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Note: Declaration of Publication filed 6/8/2015 includes the following statement: "The undersigned refuses to accept any bids." The inclusion of this statement directly contradicts the purpose of newspaper publication of a report of sale of real property; that is, to attempt to potentially secure the highest bid obtainable for the real property at the hearing, pursuant to Probate Code § 10310(b). Item 12 of the <i>Petition</i> regarding efforts to obtain the highest price obtainable for the property states that the Petitioner is a creditor of the estate with a Creditors' Claim [approved on 7/25/2014] in the amount of \$88,939.03 ; the only estate asset is the interest in the real property valued at \$72,500.00 ; the Petitioner agrees to release his entire claim in exchange for the interest in the real property; and that Petitioner already owns the remaining interest.
Cont. from 050415	Sale Price - \$72,500.00	
<input type="checkbox"/> Aff.Sub.Wit.	Overbid - \$93,885.98	
<input checked="" type="checkbox"/> Verified	Reappraisal - \$72,500.00 <i>(completed 3/20/2014)</i>	
<input checked="" type="checkbox"/> Reappraisal	Property - 33377 Tollhouse Road Tollhouse, CA 93667	
<input type="checkbox"/> PTC	Publication - Not published	
<input type="checkbox"/> Not.Cred.	Buyers - Richard Bennett, a married man, as community property	
<input checked="" type="checkbox"/> Notice of Hrg	Broker - N/A	
<input checked="" type="checkbox"/> Aff.Mail W/	Bond/block - N/A	
<input checked="" type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
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<input type="checkbox"/> Duties/Supp		
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<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input checked="" type="checkbox"/> Aff. Posting		Reviewed by: LEG
<input type="checkbox"/> Status Rpt		Reviewed on: 7/7/15
<input type="checkbox"/> UCCJEA		Updates:
<input type="checkbox"/> Citation		Recommendation:
<input type="checkbox"/> FTB Notice		File 9B - Clendenning

DOD: 01/21/13		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u> Petition on Waiver of Accounting filed 07/06/15 and set for hearing on 08/12/15</p>
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Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 07/07/15
		Updates:
		Recommendation:
		File 10 – Mason

Pro Per Petitioner Brenda Long Suta, Executor

Petition for Final Distribution and Distribution to Testamentary Trust

DOD: 8/27/2013		<p>BRENDA LONG SUTA, sister and Executor, is Petitioner.</p> <p>Account period: <u>Not stated</u></p> <p>Accounting - ? Not stated Beginning POH - \$164,236.90 Ending POH - \$159,945.10 <i>(all cash)</i></p> <p>Executor - waives</p> <p>Costs - \$2,876.00 (paid) <i>(bond premium, filing fees, probate referee, publication, certified copies, postage, Courtcall)</i></p> <p>Closing - \$200.00</p> <p>Distribution pursuant to Decedent's Will is to:</p> <ul style="list-style-type: none"> BRENDA LONG SUTA as Trustee of the ANDREA KAY LONG LIVING TRUST dated 6/12/2005 – entire estate consisting of \$159,945.10 cash. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED TO 7/30/2015 Per Petitioner request</p> <ol style="list-style-type: none"> <i>Petition</i> does not state that an accounting has been waived, but no schedules of receipts and disbursements are included, nor does the <i>Petition</i> state the account period of the final account of the estate pursuant to Probate Code § 1061(a). <i>Petition</i> does not contain a summary of account as required pursuant to Probate Code § 1061(a) and (b). Pursuant to Local Rule 7.17(B)(5), the following costs, which the <i>Petition</i> states have already been reimbursed to the Petitioner, are considered by the Court to be part of the cost of doing business and are not reimbursable costs or fees: <ul style="list-style-type: none"> \$344.00 for telephonic appearance costs (CourtCall); \$70.00 for mailing costs; \$35.00 for probate estate book <i>(may be allowable in Court's discretion)</i>. <i>Petition</i> requests to withhold \$200.00 for closing expenses for CourtCall and mailing fees. Pursuant to Local Rule 7.17(B)(5), postage costs and telephonic appearance costs are not authorized to be paid from the estate. It appears no withholding should be authorized. ~Please see additional page~
Cont. from 052815			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail <small>W/O</small>		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
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<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters 091614		
<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>Reviewed by: LEG</p> <p>Reviewed on: 7/8/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11 - Long</p>	

NEEDS/PROBLEMS/COMMENTS, continued:

5. Need proof of service by mail of the *Notice of Hearing* pursuant to Probate Code §1220(a)(1) and pursuant to § 11000 for settlement of the account for **ROY LONG**, brother.
6. *Petition* requests to distribute to the **ANDREA KAY LONG LIVING TRUST dated 6/12/2005**. Need Declaration of Trustee pursuant to Local Rule 7.12.5, which provides that if property in the estate is to be distributed to a pre-existing trust, the current trustee must file a declaration setting forth the name of the trust, its establishment date, and taxpayer identification number, verifying that the trust is in full force and effect, and that the trustee has an executed copy of the trust in possession.
7. Proposed order includes the entire cash on hand as the amount to be distributed, which may be incorrect based upon the Court's determination as to cost reimbursements.

Guardian: Gilbert Hollins (Pro Per)

Guardian: Denise Hollins (Pro Per)

Father: Mario Dean Vicks, Jr. (pro per)

Mother: Denisha Hollins (pro per)

Status Hearing re: Visitation

Age: 4 years	<p>DENISE HOLLINS and GILBERT HOLLINS, maternal grandparents, were appointed guardians after a court trial on 1/9/15.</p> <p>Father: MARIO DEAN VICKS, JR</p> <p>Mother: DENISHA HOLLINS</p> <p>Minute order dated 1/9/15 states the Court orders that the minor's counseling continue. Supervised visits for the father is ordered for every Friday from 4 p.m. to 7 p.m. and every Saturday from 12 p.m. to 4 p.m., with one or both of the guardians supervising. The visits may occur at the guardian's home or a mutually agreed upon public place. Additionally, parties may mutually agree to a different block of time for the visits. No other party shall attend the visits. The Court further orders that neither the guardians, nor the mother, nor the father shall use any alcohol, marijuana, or other illegal drugs in the presence of the minor or in the home.</p> <p>Court Investigator Report filed on 6/10/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
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	<p>Reviewed by: KT</p> <p>Reviewed on: 7/6/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 12 - Vicks</p>	

Attorney: John W. Phillips (for Petitioner William Yoshioka)

Attorney: Steven L. Shahbazian (for Executor Joyce Yamaguchi)

Attorney: Jeffrey Jaech (for Objector State Center Community College District)

Petition for Surcharge of Trustee; for Order Directing Trustee to Return Trust Property to Trust; and for Order Compelling Trustee to Account and Report

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>The petition involves the decedent's trust. The decedent's trust is a separate action and therefore cannot be heard in this estate matter. A new trust action must be initiated for issues regarding the decedent's trust.</p>
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		Reviewed on: 7/7/15
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		Recommendation:
		File 13 - Yoshioka

DOD: 5-29-12	LORI SHIBATA , Trustee, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 5/21/15: Parties request a 45 day continuance.</p> <ol style="list-style-type: none"> Petitioner requests costs. The Court may require clarification or itemization. Need order.
Cont from 111314, 031815, 041615, 052115	<p>Petitioner states: Michael A. Lee established the Michael A. Lee Declaration of Trust dated 5-27-11 and was the initial trustee until his death on 5-29-12. The Trust is now irrevocable.</p> <p>The sole remainder beneficiary of the trust is Alyssa Lee, who is currently 20 years old. The trust provides that all remaining assets of the trust are to be held in trust for the benefits of Alyssa Lee, with income to be used for her support, including educational, medical, dental, hospital, and nursing expenses. One half of the trust's assets are to be distributed to Ms. Lee at age 30, free of trust, and the other half are to be distributed to Ms. Lee, free of trust, at age 35.</p> <p>Petitioner states the only assets of the trust are a Wells Fargo checking account containing approx. \$18,000.00 and residential real property in Fresno appraised at \$140,000.00. The trust's only income is the interest earned on the checking account, which is negligible at best. The residential real property is vacant and in very poor condition and cannot be rented until deferred maintenance is done and substantial repairs are made. Monthly expenses including utilities and gardening amount to approx. \$165 per month or \$1,980 per annum. Property taxes for 2013 amounted to \$1,502.28 annually or approx. \$125 per month. Expenses to provide for the care of Ms. Lee in compliance with the trust consist of the payment of her health insurance premiums of \$281 per month or \$3,372 per year.</p> <p>On 3-5-13, Robyn L. Esraelian, attorney for Petitioner, sent a Notice of Proposed Action Pursuant to Probate Code §16500 to Ms. Lee informing her of Petitioner's proposed action to list the property for sale. However, Ms. Lee objected in writing to the sale.</p>	
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SEE ADDITIONAL PAGES		

Petitioner states the trust does not contain enough liquid assets to pay the maintenance and repairs on the home to make it habitable and income-producing, to pay current trustee's fees, and to meet the monthly obligations associated with the residence and the beneficiary. If repairs are made, the residence could probably only be rented for no more than \$950/month, which would not generate enough income to pay the monthly expenses as outlined above and ongoing costs of administration such as property management fees and trustee's fees, and would certainly not generate enough income to fulfill the intent of the Trustor.

Petitioner states selling the subject residence and investing the net sales proceeds would generate sufficient principal and income to fulfill the intent of the Trustor to provide for Ms. Lee as set forth in Article Five, Paragraph C of the Trust.

Petitioner prays for an order:

- 1. Directing her, as Successor Trustee of the Michael A. Lee Declaration of Trust, to sell the residential real property located at 773 E. Ellery in Fresno, CA;**
- 2. For costs herein; and**
- 3. For such other orders as the Court may deem proper.**

Beneficiary Alyssa Lee filed an Objection on 12-12-14. Ms Lee states she is aware of the condition of the residence and cost to maintain it, and has proposed that she or a family member be allowed to live there at a fair rental value. Respondent believes rent of \$1100/month, offset by utilities and gardening, would result in a net rental income to the trust of \$800-900, which would generate income for payment of taxes and insurance. Respondent believes that at a reasonable rental, a tenant would be responsible for gardening and property maintenance and would pay their own utilities, eliminating those expenses for the trust. Respondent also believes the sum of \$151,000 is less than fair market value, even considering the necessary repairs. Zillow.com shows the current value at \$185,000.

The residence was Respondent's father's residence and is a very meaningful property to her. She has offered to handle repairs, maintenance and upkeep, through rental, but the trustee continues to refuse to consider the beneficiary's wishes and/or cooperate with her in maintaining the residence. See email communications.

The actions of the trustee in failing to consider the wishes of the beneficiary and adopting an authoritarian and imperious attitude raise the issue of whether the trustee is in violation of the "Duty of Loyalty" Probate Code §16002(a) which requires that a trust be administered solely in the interest of the beneficiaries.

Respondent states sale of the residence resulting in proceeds to be invested over time exposes the trust to market risk. Respondent doesn't believe that a sale would further the interests of the Trustor in providing for Respondent as beneficiary. The Trustor, Michael Lee, was Respondent's father. She has a strong emotional attachment to the residence, and would like it maintained and preserved.

Respondent states she has requested information concerning the assets of the trust, but to date has received no specific or verifiable responses from the trustee about certain issues, including account balances at her father's death. Accounting information shows round numbers, but source documents have not been provided, and bank accounts seldom have round numbers. Respondent has requested information concerning personal property passing to her and her brother, and prepared a list of items known, but the trustee has failed to respond to her request for information.

SEE ADDITIONAL PAGES

Page 3

Respondent states her father had a truck that is not shown as an asset of the trust. Prior to his death, her father made statements that, "they took my car." No information has been provided regarding the vehicle.

Respondent states she was advised that at or about the time of his death, her father had placed \$40,000 in two envelopes, \$20,000 each, for each of his children. Respondent has requested information regarding those envelopes, but the trustee has failed to provide information, although the trustee has acknowledged that the envelopes existed. This money should be accounted for as trust asset.

Counsel for the trustee has twice provided accounting information about the trust. In fall of 2012, following the Trustor's death, information was provided regarding accounts and expenses incurred by the trustee (attached). In January 2014, an "informal accounting" provided additional documentation of transactions through the end of 2013. Total cash at that point was \$30,882.88. This petition indicates assets have decreased to \$18,000. The accounting is not prepared in the form prescribed by the Probate Code and failed to show the required information.

Accordingly, Respondent requests the trustee prepare an accounting in the form prescribed by law. Respondent also requests the Court review the appropriateness of the fees charged by the trustee (\$60/hour or \$5,185.20).

Petitioner requests reimbursement for costs. Respondent believes costs may be payable by the trust.

Respondent requests that:

- 1. The Court deny the petition for instructions in so far as it requests authority to list and/or sell the property and instruct the trustee to maintain and rent the residence at an appropriate rental;**
- 2. That the trustee be ordered to provide additional information concerning the trust assets and administration issues, together with additional information concerning the trust assets;**
- 3. That the trustee be ordered to file and serve on the beneficiary a revised accounting showing the assets on hand at date of death, remaining as of closing of the accounting, and to bring the account current through a date not less than 60 days prior to the rendering of the revised accounting;**
- 4. That the Court review the trustee's requested compensation;**
- 5. That the trustee's request for costs be denied; and**
- 6. For all other and proper orders.**

Atty Rube, Melvin K. (for Lori Shibata – Trustee – Petitioner)
 Atty Knudson, David N. (for Alyssa Lee – Beneficiary – Objector)

First Account Current and Report of Trustee, Petition for Trustee Fee and for Settlement of First Account Current

DOD: 5/29/12	LORI SHIBATA, Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:					
Cont from 041615, 052115	Account period: 5/29/12 -12/31/14						
	Accounting: \$222,217.13						
	Beginning POH: \$217,835.61						
	Ending POH: \$153,215.26						
	(\$13,215.26 cash plus residential real property valued at \$140,000.00)						
<input type="checkbox"/> Aff.Sub.Wit.	Trustee fee: \$3,870.00						
<input checked="" type="checkbox"/> Verified	Petitioner has been paid \$5,185.20 for services through 12-31-13 and requests \$3,870.00 for services from 1/1/14 through 12/31/14.						
<input type="checkbox"/> Inventory							
<input type="checkbox"/> PTC							
<input type="checkbox"/> Not.Cred.	Trustee reimbursement: \$428.94						
<input checked="" type="checkbox"/> Notice of Hrg	Exhibit B-2 itemizes expenses including bills, travel, services. Receipts also attached.						
<input checked="" type="checkbox"/> Aff.Mail							
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<input type="checkbox"/> Pers.Serv.	Petitioner states she has made disbursements for the maintenance of the residence owned by the trust and for the support and maintenance of Alyssa Lee and her minor daughter Ariana. Petitioner, upon taking over as trustee, determined that the real property owned by the trust was not in a condition to be rented to a third party. The cost to repair is approx. \$15,000.00. See inspection report attached. In addition, the sewer is in need of repair to make the real property habitable, which additional cost is \$1,200-\$1,400.						
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<input checked="" type="checkbox"/> Objections	Rent would likely be approx. \$950/month. With the cost of property taxes, insurance, manager, yard care, and general maintenance, and health insurance premiums, there would not be sufficient funds to provide for the support and maintenance of the beneficiary and her minor child. See breakdown. The decedent intended that income to the trust was to be used to provide for Alyssa Lee until she was 35. Decedent as trustor authorized the invasion of principal (i.e., the sale of the residence) to accomplish this goal. The primary goal was not to allow Alyssa to live in the house, but to provide income until she reached 35.						
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	SEE PAGE 2	<table border="1" style="width: 100%;"> <tr> <td>Reviewed by: skc</td> </tr> <tr> <td>Reviewed on: 7/7/15</td> </tr> <tr> <td>Updates:</td> </tr> <tr> <td>Recommendation:</td> </tr> <tr> <td>File 15B- Lee</td> </tr> </table>	Reviewed by: skc	Reviewed on: 7/7/15	Updates:	Recommendation:	File 15B- Lee
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File 15B- Lee							

Page 2

Petitioner states she has delivered all personal property to Alyssa Lee as requested, and is unaware of any other personal property referred to by Alyssa Lee. Petitioner has responded to requests for "missing property" on numerous occasions and has advised her that there is no other personal property and nothing has been removed from the home other than the items taken by Alyssa Lee and her mother and brother. Petitioner has responded to Alyssa Lee's inquiries re the truck on several occasions. See Exhibits D-1 and D-2 which show the transfer of the truck to the decedent's parents.

The decedent withdrew money from his checking account prior to his death and delivered the cash to his father. At the time, there was no written instruction as to the disposition of the cash. Therefore, upon his death, his father delivered the cash to Petitioner to deposit to the trust.

Petitioner prays for an order as follows:

- 1. Approving, allowing, and settling the First Account;**
- 2. Authorizing the trustee fees and reimbursement;**
- 3. For such other and further relief as the Court considers proper.**

Objections filed 5-7-15 by Alyssa Lee, Beneficiary, state the primary asset of the trust is the residence on Ellery in Fresno. From the time of her father's death, Alyssa has repeatedly requested that the house be retained for her eventual use and benefit, but the trustee has rejected those claims and assertions, even when provided information and an agreement by beneficiary and other family members to maintain the residence. Twice she has sought to sell the house by giving notice of proposed action; both times Alyssa has objected. Alyssa also objected to the Petition for Instructions, requesting additional information and an accounting. Alyssa now makes the following objections:

1. Trustee's Fees. The trustee's fees as reported and requested are excessive, both fees already paid, and fees for which approval is requested. Objector specifically references travel time, rate of approx. \$70.36/hr, and food purchases for two persons.
2. Attorney's Fees. While Objector acknowledges that the trustee is entitled to representation and advice in administration of the trust, there is no showing that the attorney's fees incurred were for the benefit of the trust and the beneficiary. Given the circumstances and the overall situation of the trust, it appears the trustee is incurring excessive attorney fees that are not in the best interest of the trust or its beneficiaries.

SEE ADDITIONAL PAGES

3. Trustee is not administering the trust in the best interest of the beneficiary and has refused to consider the beneficiary's requests, unilaterally interposing her own will in spite of requests by the beneficiary. Objector believes the Trustee has thwarted and attempted to destroy or remove any memories or links to her father. She was not advised of nor given the opportunity to attend the memorial service; she was not invited to go with the trustee and other family members on a chartered boat trip to dispose of his ashes. See accounting for documentation of funds spent on these events, including boat, luncheon for "Mike's family," limousine service, etc. Various items of jewelry that her father held for in the residence were not given to her, nor has the trustee been accommodating in seeking their return from family members who may have taken them. Prior to his death, Michael Lee was working on remodeling and refurbishing the house. There were various materials, including shelving, flooring, in the house. However, the trustee refused to proceed with any of the work and told Objector and/or Objector's mother that those items would be given away or thrown away. As the materials amounted to a substantial investment, the items were removed and are in storage at Objector's residence to be installed in the Ellery residence.

Objector and her mother also proposed the house be rented to a family member at \$850/month, with the family member to pay for water, garbage, lawn care, but in an email to Objector's mother Elizabeth Rocha-Lee, the trustee displayed a condescending and unyielding attitude. The trustee characterized the proposed rental as sub-par, even though this was an amount determined with reference to deductions for property management fees and other costs based on information provided by the trustee.

Alyssa also presented estimates for repair, which were discarded and discounted by the trustee. Now, after the trust has dissipated more than \$10,000 of available trust cash in carrying costs on the residence, payment of attorney's fees, and trustee's fees for trips back and forth to Fresno, Ms. Shibata now states the trust does not have the money to place the residence in rentable condition. At the time these proposals were made in 2013, there was and would have been sufficient cash to repair the residence with the assistance of the beneficiary and other family members who have an interest in preserving and maintaining it – an interest that the trustee does not share.

Accordingly, the trustee's actions with respect to the residence have not been in the beneficiary's interest, nor consistent with her wishes for preservation of the residence for her eventual long term use and enjoyment.

4. Trustee has been uncommunicative and uncooperative.
 - a. In May 2012, the trustee opened an account for Alyssa's benefit, and deposited \$500 into it. However, when Alyssa withdrew the funds for her use, as provided by the terms of the trust, the trustee refused to deposit more funds and then closed the account.
 - b. The trustee persuaded to and did provide Kaiser medical insurance for the beneficiary; however, Alyssa does qualify for Medi-Cal and may determine that private medical insurance is no longer required. Alyssa has a young daughter, who, when born was also covered under Kaiser insurance, however, when that daughter was eligible for Medi-Cal, Alyssa requested that Kaiser for the child be cancelled. The trustee, however, misunderstood and sought to cancel Alyssa's medical insurance.

SEE ADDITIONAL PAGES

Dept. 303, 9:00 a.m. Thursday, July 9, 2015

- c. Other than paying the premiums on the medical insurance, the only benefit the trustee has provided to Alyssa was paying \$376.83 for a stroller, car seat and pay pen for the infant.
- d. The trustee has committed waste. In various communications, a shed was listed as being at the residence, but when the shed disappeared, she claimed she had no knowledge of it. Decedent was known to have had a number of tools, yet upon his death they could not be found. Alyssa believes Lori Shibata permitted other family members (Mike's siblings and parents) free access to the house.

Prior to his death, the decedent made statements to his wife and daughter that "they took my truck." When asked, Lori Shibata stated the truck had been given to his father or other family members. Now documentation appended to the account indicates the Toyota Tacoma was sold for \$1,000 to Raymond Yee, which Alyssa believes is far less than its fair market value.

Other instances of neglect and waste: the account shows the trustee had to address squatters in the residence. Objector previously advised the trustee that the locks were not working, but she did not replace them. Offers of assistance by Alyssa, her mother, and other family members to look after the residence or assist with its care have been rejected. As a result, it has not generated any income.

- e. The trustee has not satisfactorily explained the "missing \$40,000.00." See Objection for details.
5. Objector states the trust is ambiguous; it was not the decedent's intent that the residence be sold. Also, Article II claims no provision was made for Elizabeth D. Rocha Lee and/or Ramon Lee; however, Article 5a provides that personal effects, automobiles, and personal property are to be distributed to his children. The assets of the trust are to be retained with distributions to Alyssa one half at age 30 and the balance at age 35, however, the trust has generated less than \$100 of income during the last two years. The Trust is also ambiguous at Article V(g) which does not indicate any residual takers.

Accordingly, extrinsic evidence can and should be admitted to determine the trustor's intent in executing the trust document and what he meant to provide for his daughter Alyssa.

Objector requests that her objections be sustained, that the claimed charges be disallowed, that the trustee be surcharged for excessive and unnecessary trustee's fees and attorney's fees, that the request for approval of additional attorney's fees be denied, that the Court admit extrinsic evidence to construe the terms of the trust and the trustor's intent in providing for the beneficiary, that the trustee be instructed to provide additional information and seek additional information concerning the assets described herein, that the trustee be instructed to cooperate with the beneficiary to attempt to implement a plan by which the residence may be maintained to generate income for the beneficiary and ultimately for her use and benefit, and for all other and proper orders.

See also Declaration of Elizabeth Rocha-Lee in support of objections.

Attorney: Marvin T. Helon (for Petitioner/Executor Allen Dudley)

Report of Executor and Petition for Allowance of Fees and Reimbursement of Costs, and for Final Distribution on Waiver of Accounting.

DOD: 9/24/14		<p>ALLEN DUDLEY, Executor, is petitioner.</p> <p>Accounting is waived.</p> <p>I & A - \$197,874.17 POH - \$199,948.10</p> <p>Executor - waives</p> <p>Attorney (less than statutory) - \$5,500.00</p> <p>Costs - \$1,475.04 (filing fees, publication, certified copies, probate referee)</p> <p>Closing - \$750.00</p> <p>Distribution, pursuant to Decedent's Will, is to:</p> <p>Allen Dudley as Trustee of the Dudley Family Trust - \$84,595.82, Charles Schwab IRA and U.S. Savings Bonds.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
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		Reviewed on: 7/7/14		
		Updates:		
		Recommendation: SUBMITTED		
		File 16 – Dudley		

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Petitioner resides in Salinas, CA.</p> <p>1. If diligence not found, need notice to paternal grandparents pursuant to Probate Code §1511.</p>	
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		Recommendation:		
		File 17 - Shannon		

Age: 5	<p>DILILA AGANZA, mother, was appointed Guardian of the Estate on 04/23/15 with bond set at \$100,980.00.</p> <p>Minute Order from 04/23/15 set this hearing for status regarding filing of the bond.</p> <p>Declaration of Dilila Aganza Regarding Bond and Amount of Estate filed 07/07/15 states: According to Prudential, the amount in the 401K as of 06/23/15 is \$11,907.11, however, Prudential also indicated that taxes in the amount of \$2,381.42 (federal) and \$238.14 (state) will be deducted from the principal leaving a balance of \$9,287.55 to be distributed. Further, Prudential indicated that there may be an additional 10% early withdrawal fee. If the 10% fee is applied, it will have a negligible effect on the bond fee.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 06/11/15 Minute Order from 06/11/15 states: Counsel is to file a declaration or written status report by 07/07/15 containing written confirmation from Prudential stating the amount that they intend to issue.</p> <p>Note: Based on the principal amount of \$9,287.55 as stated in the declaration filed 07/07/15, bond should be set at \$10,216.31; however, pursuant to Local Rule 7.8.1 I: absent a showing of good cause, it is the policy of this court to block all funds in Guardianship Estates.</p>
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		Reviewed by: JF
		Reviewed on: 07/07/15
		Updates:
		Recommendation:
		File 18 - Gonzalez

19
Petitioner

Geovanni Sanchez (GUARD/P) Case No. 15CEPR00365

Saravia, Diana Vanessa (Pro Per – Non-relative – Petitioner)

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

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 6/11/15:</u> Matter continued for proof of service as to Teresa Ortega. (Served 6/20/15)</p>	
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✓	Order			
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	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 7/6/15	
			Updates:	
			Recommendation:	
			File 19 - Sanchez	

Petition for Letters of Administration; Authorization to Administer Under the Independent Administration of Estates Act

DOD: 6/12/2007		<p>ABDOWALI MOHAMED, son, is petitioner and requests appointment as Administrator without bond.</p> <p>All heirs waive bond.</p> <p>Full IAEA – o.k.</p> <p>Decedent died intestate.</p> <p>Residence: Fresno Publication: Fresno Business Journal</p> <p>Estimated value of the estate: Real property - \$200,000.00</p> <p>Probate Referee: Steven Diebert.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Waivers on bond must be on the mandatory Judicial Council form. (Form no. DE-142)</p> <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Wednesday, December 16, 2015 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Wednesday, September 14, 2016 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>	
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 type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/
<input checked="" type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p>Reviewed by: KT</p> <p>Reviewed on: 7/7/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 21 – Mohamed</p>		

Attorney: Alan D. Khalfin (of Burlingame, CA for Petitioner George Berz)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under the Independent Administration of Estates Act

DOD: 10/18/08	GEORGE E. BERZ , named executor, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need name and date of death of spouse. Local Rule 7.1.1D. 2. Doreen Marti, named beneficiary, was not listed on #8 as required. 3. Bonnie Berz, named beneficiary, was not listed on #8 as required. 4. Need proof of service of the Notice of Petition to Administer the Estate on: <ol style="list-style-type: none"> a. Bonnie Berz (beneficiary) b. Doreen Marti (beneficiary) 5. Need waiver of bond from: <ol style="list-style-type: none"> a. Ann Monid (beneficiary) b. Heather Shannon (beneficiary) c. Bonnie Berz (beneficiary) d. Doreen Marti (beneficiary) – Probate Code 8481 (a)(2) or bond set at \$150,000 <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Wednesday, August 12, 2015 at 9:00 a.m. in Department 303, for the filing of the bond, if required. • Wednesday, December 16, 2015 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. • Wednesday, September 14, 2016 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
	Full IAEA – o.k.	
	Holographic Will dated: 11/21/2007	
Cont. from	Residence: Fresno Publication: Fresno Business Journal	
<input checked="" type="checkbox"/> Proof of Holographic Instrument		
<input checked="" type="checkbox"/> Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Estimated value of the estate: Real property- \$150,000.00	
<input checked="" type="checkbox"/> Aff.Mail W/		
<input checked="" type="checkbox"/> Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	Probate Referee: Rick Smith	
Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	Reviewed by: KT	
	Reviewed on: 7/7/15	
	Updates:	
	Recommendation:	
	File 22 - Berz	

Petitioner McGinnis, Angela (Pro Per – Cousin)

Petition for Appointment of Temporary Guardianship of the Person

Brandon Age: 15		<p align="center"><u>GENERAL HEARING 08/31/2015</u></p> <p>ANGELA MCGINNIS, cousin, is petitioner.</p> <p align="center"><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. UCCJEA is incomplete. Need minors' residence information for the past 5 years.</p>	
Matthew Age: 15				
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 type="checkbox"/>	Notice of Hrg			n/a
<input type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			n/a
<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 checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
<p>Reviewed by: LV</p>				
<p>Reviewed on: 07/07/2015</p>				
<p>Updates:</p>				
<p>Recommendation:</p>				
<p>File 23 – Casner</p>				

Petitioner Benson, Robert James (Pro Per, father)
 Petitioner Benson, Victoria Lynn (Pro Per, mother)

Petition for Appointment of Probate Conservator of the Person

		NO TEMPORARY REQUESTED	<p>ROBERT BENSON and VICTORIA BENSON, parents, are Petitioners and request appointment as Co-Conservators of the Person with medical consent powers.</p> <p style="text-align: center;">~Please see Petition for details~</p> <p>Court Investigator's Report was filed on 6/12/2015.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator Advised Rights on 6/10/2015.</p> <p>Voting Rights Affected – Need Minute Order.</p> <p><u>Continued from 7/6/2015.</u> Minute Order states continued for video viewing receipt.</p> <p>The following issue from the last hearing remains:</p> <ol style="list-style-type: none"> 1. Need Conservatorship Video Viewing Certificate pursuant to Local Rule 7.15.9(A). Petitioners can visit the Court's website which provides a link to view the video and printable receipt for viewing by each Petitioner that must be filed with the Court.
Cont. from 070615				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input checked="" type="checkbox"/>	Cap. Dec.			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail	W/		
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt	X		
<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: 7/8/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 24 - Benson</p>	