



ATTENTION

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

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

Thank you for your patience.

1 Cain Blanco, Trinity Blanco and Vanity Blanco (GUARD/P)

Case No. 11CEPR00659

Petitioner: Oriana S. Blanco (pro per)
 Guardian: Rosemary Blanco (pro per)

Petition for Termination of Guardianship

		ORIANA S. BLANCO , mother, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 12/8/15. Minute order states continued for the Court investigator to re-interview the parties and provide the Court with an updated recommendation after additional time as passed.</p> <p>1. The proofs of service for the guardian, the grandparents and the minors does not include the name and address of the person serving the notices. The proof of service does include a signature but the signature is illegible.</p>
		ROSEMARY BLANCO , paternal grandmother, was appointed guardian on 1/15/13.	
<p>Conf. from 081815, 091515, 102015, 120815</p>		Please see petition for details.	
	Aff.Sub.Wit.		
✓	Verified	Court Investigator Report filed 8/11/15	
	Inventory		
	PTC	Court Investigator Supplemental Report filed 7/6/16	
	Not.Cred.		
✓	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W/	
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: KT
			Reviewed on: 7/5/16
			Updates:
			Recommendation:
			File 1 – Blanco

DOD: 11/18/2010	<p>BEVERLY T. ADAMS, spouse, was appointed Executor with full IAEA authority without bond on 06/25/2012.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
	<p>Letters issued on 06/28/2012.</p>	
	<p>Inventory and Appraisal was due 10/26/2012.</p>	<p>Minute Order of 12/08/2015: Counsel requests six months.</p>
<p>Cont. from 072613, 110813, 112414, 120914, 060215, 120815</p>	<p>Status Report and Request for Continuance filed 11/25/2015 (for 12/08/2015 hearing) states Beverly T. Adams needed to be appointed as Personal Representative of her late husband's estate in order to file a wrongful death lawsuit on his behalf stemming from an airplane crash in Florida on 11/17/2010. The lawsuit was filed in Florida Southern District Court on 05/14/2013, Case No. 2:13-cv-14206. Mediation was not successful in this matter. The original trial date was August 15, 2014. The trial was continued to 11/17/2014, then again to 01/12/2015, and was finally scheduled for a two week trial beginning 05/19/2015. However the judge dismissed the case on the first day of trial.</p>	<p>1. Need Inventory and Appraisal and First Account or Petition for Final Distribution.</p>
Aff.Sub.Wit.	<p>Following the dismissal, Plaintiff's counsel in the litigation matter filed a Motion for Reconsideration or to Alter and Amend Judgment. To date, no reply has been received from the Judge, and the last activity date in the matter was 07/30/2015. Plaintiff's counsel was not able to estimate a time frame for reply by the Judge in order to provide this Court with a time frame for filing the I&A or petition to close this estate.</p>	<p>Reviewed by: LV</p>
Verified	<p>An Inventory and Appraisal is not needed at this time as there is currently no real or personal property to be appraised. The sole probate asset at issue is the potential recovery in the litigation matter. In the event that the appeal and subsequent trial is resolved in favor of the decedent, the Personal Representative will file and Inventory and Appraisal at that time, as the decedent has no other property subject to probate. It is respectfully request that this probate matter be continued six months pending the anticipated filing of an appeal and eventually resolution of the wrongful death litigation.</p>	<p>Reviewed on: 07/06/2016</p>
Inventory		<p>Updates:</p>
PTC		<p>Recommendation:</p>
Not.Cred.		<p>File 2 – Adams</p>
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		

Attorney Melinda Bell, of San Juan Capistrano (for Guardian Jana Keeley)

Probate Status Hearing Re: Proof of Funds in a Blocked Account

		<p>JANA KEELEY, mother, was appointed as Guardian of the Estate on 9/15/2015, with deposits of \$151,118.83 of life insurance proceeds and funds in an IRA into a blocked account at Fresno County Federal Credit Union.</p> <p>Letters of Guardianship issued on 10/5/2015.</p> <p>Minute Order dated 9/15/2015 from the hearing on the petition for appointment of guardian set this status hearing on 12/15/2015 for filing of proof of funds deposited into a blocked account.</p> <p>Minute Order dated 12/15/2015 from the status hearing for proof of funds placed in blocked account states counsel represents than an insurance check was received and deposited last night, but they are still waiting on an additional check from Wells Fargo; requests a continuance. Matter continued to 2/16/2016.</p> <p>Inventory and Appraisal Partial No. 1 filed 2/2/2016 shows funds deposited into a blocked account totaling \$149,753.11.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 6/21/2016. Minute Order states Wells Fargo is ordered to transfer all funds into the blocked account forthwith. Also, the Court orders Molly Miller or a representative who has the authority to transfer funds to be personally present or by CourtCall on 7/12/2016 if funds have not been transferred by 7/8/2016. Decedent's name is Emerson Katigbak, Account Number [omitted.]</p> <p>Note: Court records do not show receipt has been filed as of 7/6/2016. The following issue from the last hearing remains:</p> <ol style="list-style-type: none"> 1. Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked Account filed 2/10/2016 shows funds deposited of \$149,753.11. Need receipt for the additional funds of \$1,365.72 in order to demonstrate total deposit of \$151,118.83 as ordered.
Cont. from 121515, 021616, 051716, 062116			
Aff.Sub.Wit.			
Verified			
Inventory			
Blocked Recpt.	X		
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: LEG	
		Reviewed on: 7/6/16	
		Updates:	
		Recommendation:	
		File 3 – Katigbak	

4 Sergio Regino Guerrero (GUARD/P)

Case No. 12CEPR01066

Petitioner Ayala, Susannha (Pro Per – Mother)

Petition for Termination of Guardianship

		SUSANNHA AYALA, mother, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		<u>Please see petition for details</u>	
Cont. from 053116			<p>Minute Order of 05/31/2016: Examiner notes provided in open Court.</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment for Termination of Guardianship for: <ul style="list-style-type: none"> • Maria Luisa Rodriguez (co-guardian) • Aciano Chano Rodriguez (co-guardian) • Mateo Guerrero (Father) • Regino Guerrero (Paternal Grandfather) • Paternal Grandmother (not listed) • Jose L. Ayala (Maternal Grandfather) • Maria Ayala (Maternal Grandmother)
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	X	
<input type="checkbox"/>	Aff.Mail	X	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: LV
			Reviewed on: 07/06/2016
			Updates:
			Recommendation:
			File 4- Guerrero

5A Gary F. Morris, Sr., 2013 Trust

Case No. 13CEPR01104

Attorney Nancy J. LeVan (for Petitioner Gary Morris, Jr., Beneficiary)

Attorney Jennifer Walters (for Walter A. Morris, Successor Trustee)

Petition to Compel Accounting by Trustee of the Gary F. Morris, Sr. 2013 Trust and Petition for Distribution of Trust Assets to Doug Standing, Trustee of the Gary Morris, Jr. Trust and Petition for Fees and Costs

DOD: 10/19/2013	GARY MORRIS, JR. , Beneficiary, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS: Page 5B is a Fee Waiver Review. Continued from 5/31/2016. Minute Order states Ms. Walters is unsure whether or not what has been provided is acceptable to Ms. LeVan. The Court is aware of a late-filed status report that was not reviewed for today's hearing. [Court records do not show an accounting has been filed as of 7/6/2016.]</p> <p>Notes for background:</p> <ul style="list-style-type: none"> Minute Order dated 5/3/2016 from a previous hearing states Ms. Walters called the Court this morning to advise of her inability to appear today; her office asked Ms. LeVan to request a continuance. Minute Order dated 3/15/2016 from a previous hearing states counsel is in disagreement as to what has been provided. If all of the information has not been provided by 5/3/2016, then Walter Morris is ordered to be personally present or present via CourtCall on 5/3/2016. Walter Morris did not appear in Court. Minute Order dated 1/5/2016 from the a previous hearing states Ms. Walters represents that there have been continued difficulties in obtaining the bank statements, but the accounting is otherwise completed and ready for filing. Ms. LeVan agrees to the accounting being filed without the missing statements; Ms. Walters will proceed with the filing.
	Petitioner states:	
	<ul style="list-style-type: none"> WALTER A. MORRIS was appointed as Successor Trustee of the GARY F. MORRIS, SR., 2013 TRUST on 4/1/2014 [copy of Trust attached as Exhibit A to Declaration of Clerical Error and Omissions filed 10/2/2015]; The GARY F. MORRIS, SR., 2013 TRUST terms provide that the balance of the Trust estate, including all assets poured into the Trust as a result of Trustor's death, is to be distributed to BARBARA TURNER, Trustee of the GARY F. MORRIS, JR., TRUST; BARBARA TURNER resigned as Trustee of both Trusts, and WALTER A. MORRIS was appointed as Successor Trustee; Petitioner requests the Court compel WALTER A. MORRIS, as Trustee of the GARY F. MORRIS, SR., 2013 TRUST, to distribute the remaining assets in the GARY F. MORRIS, SR., 2013 TRUST to DOUG STANDING, Trustee of the GARY F. MORRIS, JR., TRUST within 30 days of the order approving this petition; ~Please see additional page~ 	
Cont. from 100615, 111715, 010516, 020916, 031516, 050316, 053116		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
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<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
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<input type="checkbox"/> Duties/S		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
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<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: LEG	
	Reviewed on: 7/6/16	
	Updates:	
	Recommendation:	
	File 5A – Morris	

Petitioner states, continued:

- **GARY F. MORRIS, SR., 2013 TRUST** terms provide that the Trustee shall periodically, but not less than once each year, render an account of its administration of the Trust(s) under the Trust instrument to all current income beneficiaries;
- **GARY F. MORRIS, SR's.**, date of death is 10/9/2013 [sic]; **WALTER A. MORRIS** was appointed as Successor Trustee on 4/1/2014; to date, no accounting has been received from **WALTER A. MORRIS**.

Petitioner prays the Court Order:

1. An accounting from **WALTER A. MORRIS** from the period when he was Successor Trustee of the **GARY F. MORRIS, SR., 2013 TRUST** from 4/1/2014 until 8/31/2015;
2. **WALTER A. MORRIS**, Successor Trustee of the **GARY F. MORRIS, SR., 2013 TRUST**, [shall] distribute all of the remaining assets in the **GARY F. MORRIS, SR., 2013 TRUST** to **DOUG STANDING**, Trustee of the **GARY F. MORRIS, JR., TRUST** within 30 days of the signed of the order approving this *Petition*;
and
3. Allowing attorney fees and costs to Petitioner to be paid by Walter Morris for failure to file accounting and distribute assets pursuant to **GARY F. MORRIS, SR., 2013 TRUST** terms.

Notes:

- Filing fee of **\$435.00** is currently due from Petitioner, who filed the *Petition* using a fee waiver, which is pending. The **\$435.00** filing fee is appropriately payable from Trust assets. *Declaration of Clerical Error and Omissions* filed 10/2/2015 states Petitioner agrees that a filing fee should be paid by Walter Morris, Trustee of the **GARY F. MORRIS, SR., 2013 TRUST**; however, Walter Morris is not communicating with the beneficiary, Gary Morris, Jr., his attorney, nor the Successor Trustee of the **GARY F. MORRIS, JR., TRUST**; the beneficiary has no access to funds of the Trust.
- *Order Setting Bond Amount* filed 4/25/2015 set bond at **\$286,000.00**, proof of which was filed on 5/9/2014. *Order Reducing Bond Amount* filed 5/13/2015 finds that the bond amount for **WALTER A. MORRIS**, as Trustee of the **GARY F. MORRIS, SR., 2013 TRUST** is reduced to **\$152,137.88**, which is the amount of net proceeds [distributed to the seller of the Trust real property] plus **10%**.
- *Declaration of Clerical Error and Omissions* filed 10/2/2015 attaches as *Exhibit B* a copy of the Bond renewal that was mailed to Walter Morris, and states it is unknown what Walter Morris did with it.
- *Order on Ex Parte Petition for Payment of Allowance to Gary Morris, Jr. for Housing Pursuant to Article 2, Section 2.04(D) of the Gary Morris, Sr. Revocable Trust dated 9/3/2013* filed on 1/29/2016 was withdrawn and dismissed on 3/10/2016.

Attorney Nancy J. LeVan (for Petitioner Gary Morris, Jr.)

Fee Waiver Review

DOD: 10/19/2013		NEEDS/PROBLEMS/COMMENTS: <u>Continued from 5/31/2016.</u>
Cont. from 100615, 111715, 010516, 020916, 031516, 050316, 053116		
Aff.Sub.Wit.		
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Status Rpt		
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Citation		
FTB Notice		
		Reviewed by: LEG
		Reviewed on: 7/6/16
		Updates:
		Recommendation:
		File 5B – Morris

Petition for Transfer

		<p>EVANGELINE FERNANDEZ, Mother, and LAURA RUDD, Sister, were appointed Co-Conservators of the Person on 5/29/14.</p>	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Note: The Court will set a status hearing for the receipt of the file by Orange County Superior Court as follows:</p> <ul style="list-style-type: none"> • Tuesday, January 10, 2017 	
<input type="checkbox"/>	Aff.Sub.Wit.			<p>COURT INVESTIGATOR JENNIFER DANIEL filed this Petition for Transfer on 5/25/16. Notice of Hearing was mailed to the Co-Conservators, their attorney, and the Conservatee on 5/25/16.</p> <p>Petitioner states the Co-Conservators and the Conservatee currently reside in Irvin, CA; therefore, Orange County is the appropriate venue pursuant to Probate Code §2215.</p> <p>The petition recommends that fees and costs related to the transfer be waived.</p>
<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			
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<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen	<p>Reviewed by: skc</p> <p>Reviewed on: 7/6/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 6- Fernandez</p>		
<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			

Attorney Eric R. Brown, of Carmichael (for Petitioner Lee X. Yang, Administrator)
 Attorney Marvin T. Helon (Court-appointed Guardian ad Litem for minor beneficiaries)
 Attorney William C. Seiffert, of Citrus Heights (for Jason Yang, Claimant)

Probate Status Hearing Re: Agreement to Sell the Property

DOD: 1/16/2014	LEE X. YANG , nephew, was appointed Administrator with Full IAEA Authority without bond on 7/7/2014. Letters issued on 7/23/2014.	NEEDS/PROBLEMS/COMMENTS: 1. Need amended final account, or current verified status report pursuant to Local Rule 7.5(B), which provides that in all matters set for Status Hearing a verified Status Report must be filed no later than 10 days before the hearing; notice of the status hearing with a copy of the Status Report shall be served on all necessary parties.
Cont. from	First Account and Report of Status Administration was filed 9/18/2015, subsequent to the filing of a <i>First and Final Report of Administrator on Waiver of Account, etc.</i> , on 3/9/2015.	
Aff.Sub.Wit.	<p>Minute Order dated 6/7/2016 from the last hearing on the First Account set this matter for status on 7/12/2016 and states: Mr. Brown will be filing an amended petition. The Court indicates that if the property is sold, the Court will order that any net proceeds are to be placed into a blocked account. On 7/12/2016, the Court will consider the issues of bond and limited authority, as well as set status hearings.</p>	
Verified		
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Notice of Hrg		
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Objections		
Video Receipt		
CI Report		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LEG
		Reviewed on: 7/6/16
		Updates:
		Recommendation:
		File 7- Lee

8 Neveah Musgrave & Lillie Musgrave (GUARD/P) Case No. 14CEPR01146

Guardian Musgrave, Leon (Pro Per)

Probate Status Hearing RE: Proof of Guardianship in Ohio

	LEON MUSGRAVE , maternal great-grandfather was appointed guardian on 02/24/2015.	NEEDS/PROBLEMS/COMMENTS:
	Order Fixing Residence Outside of the State of California was granted on 11/10/2015 allowing the petitioner to move to the state of Ohio.	
	A Status Hearing regarding Proof of Establishment of Guardianship in Ohio was set for 04/12/2016.	
	Minute Order of 04/12/2016: states there was no appearances. The Court issues an Order to Show Cause to Leon Musgrave as to why he should not be removed as guardian for failure to establish a guardianship in Ohio and failure to be present today. Leon Musgrave is ordered to be personally present or present via CourtCall on 05/24/2016.	
	Minute Order of 05/24/2016: The Order to Show Cause is vacated. Counsel represents that a hearing in Ohio is set for 07/06/2016. The Court admonishes that paper proof of the guardianship must be filed.	
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
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Aff. Posting		
Status Rpt		
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Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 07/07/2016
		Updates:
		Recommendation:
		File 8- Musgrave

Petition for Visitation

		JULIA PENA, maternal aunt, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Petitioner, Julia Pena, filed this petition using a fee waiver. The fee waiver on file was for her petition to be appointed guardian and was based on the minor's information. Since she was not appointed as guardian that fee waiver is no longer valid. Petitioner will need to either file a new fee waiver or pay the filing fee of \$60.00.</p> <p>For Respondent Maria Lemus Cisneros:</p> <p>1. Response filed on 6/16/16 does not include a proof of service.</p>
		MARIA LEMUS CISNEROS, paternal aunt, was appointed guardian on 3/16/16.	
		Please see petition for details.	
Cont. from		Response to Petition for Visitation filed by Maria Lemus on 6/16/16	
<input type="checkbox"/>	Aff.Sub.Wit.	Declaration of Julia Pena filed on 6/21/16	
<input checked="" type="checkbox"/>	Verified	Declaration of Julia Pena filed on 6/24/16	
<input type="checkbox"/>	Inventory	Declaration of Julia Pena filed on 6/28/16	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input checked="" type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	X	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 7/5/16
			Updates:
			Recommendation:
			File 9- Lemus

Probate Status Hearing RE: Filing of the Inventory and Appraisal

DOD: 11/27/2014	ZEPURE "ZEPPY" ATTASHIAN, attorney and named executor, was appointed Executor with full IAEA without bond on 11/12/2015.	NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Final I&A filed 6/27/2016.
	Letters issued 11/16/2015.	
Cont. from 041916, 053116		
<input type="checkbox"/> Aff.Sub.Wit.		
<input type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory		
<input checked="" type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		
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<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
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<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: SEF
		Reviewed on: 7/6/2016
		Updates:
		Recommendation:
		File 10- Bongardt

Petitioner Castillo, Valerie (Pro Per – maternal aunt)

Petition for Appointment of Guardian of the Person

	TEMPORARY EXPIRES 01/26/16; extended to 3/22/2016; extended to 4/19/2016; extended to 5/31/2016; extended to 7/12/2016		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 5/31/2016. Minute Order states the Court finds due diligence as to Byron Tokumoto, and parties represent that the paternal grandparents of Ryan are both deceased. Matter is continued for notice as to Will Bailey, father of Zoe, and Will Bailey, paternal grandfather of Zoe. The Court admonishes that parties should never bring a minor to court.</p> <p>The following defects from the last hearing remain:</p> <p>1. Need proof of service 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person or Consent & Waiver of Notice, or Declaration of Due Diligence</i>, for:</p> <ul style="list-style-type: none"> a. Will Bailey, Zoe's father; b. Will Bailey, Zoe's paternal grandfather. <p>Note for background: Minute Order dated 2/2/2016 from a previous hearing states, in pertinent part, that the Court orders that all visits are to be supervised by Valerie Castillo.</p>
	VALERIE CASTILLO, maternal aunt, is Petitioner.		
	Objection to Guardianship filed 10/22/15 by Patricia Castillo.		
	Court Investigator filed a report on 11/23/15.		
	Declaration of Patricia Castillo filed 11/25/15.		
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
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✓	Notice of Hrg		
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✓	Objections		
	Video Receipt		
✓	CI Report		
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	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: JF / LEG
			Reviewed on: 7/6/16
			Updates:
			Recommendation:
			File 11 – Tokumoto/Bailey/Castillo

Waiver of Accounting and Report of Executor and Petition for Its Settlement; Waiver of Executor's Commissions; for Allowance of Attorney's Fees for Ordinary Services, for Costs Reimbursement, and for Final Distribution

DOD: 11/30/15	KAREN SIMS , Executor with Full IAEA without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Accounting is waived	
	I&A: \$266,500	
<input type="checkbox"/> Aff.Sub.Wit.	POH: \$266,500	
<input checked="" type="checkbox"/> Verified	(real property plus two vehicles)	
<input checked="" type="checkbox"/> Inventory	Executor waives statutory compensation	
<input checked="" type="checkbox"/> PTC		
<input checked="" type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Attorney (Statutory): \$8,330.00	
<input checked="" type="checkbox"/> Aff.Mail	Costs: \$435.00 (filing)	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.	Distribution pursuant to Decedent's will and agreement between heirs:	
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	Karen Sims: A 50% interest in the real property in vehicles	
<input checked="" type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp	Daniel Mehling: A 50% interest in the real property in vehicles	
<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: skc
		Reviewed on: 7/6/16
		Updates:
		Recommendation: SUBMITTED
		File 12- Mehling

Petition for Appointment of Guardian of the Person

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 6/7/16:</u> Examiner notes provided in open court. The Court will address the issue of the mother residing in the home of the petitioner at the hearing on 7/12/16.</p> <p><u>Note:</u> It appears all service issues have now been cured.</p>	
Cont. from 042616, 060716				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
		Reviewed by: skC		
		Reviewed on: 7/5/16		
		Updates:		
		Recommendation:		
		File 15- Robles		

Petitioner Newman, Kristie Leigh (Pro Per – Maternal Grandmother – Petitioner)

Petitioner Newman, Roger Dale (Pro Per – Maternal Grandfather – Petitioner)

Petition for Appointment of Guardian of the Person

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
N/A	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed by: skc	
		Reviewed on: 7/6/16	
		Updates:	
		Recommendation:	
		File 16- Newman	

17 Amelia Molina, Isabella Molina, Richard Molina, III, and
David Molina (GUARD/P) Case No. 16CEPR00493

Petitioner Theresa Molina (Pro Per, paternal grandmother)

Petition for Appointment of Guardian of the Person

		NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
		<p>THERESA MOLINA, paternal grandmother, is Petitioner.</p> <p style="text-align: center;"><i>~Please see Petition for details~</i></p> <p>Court Investigator's Report was filed on 7/5/2016.</p>	<p>Note To Examiner: As of 7/6/16, DSS Clearance was pending for several parties per CI Report filed 7/5/16. Need to confirm clearances received.</p> <p>1. Need proof of service by mail of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian</i>, or <i>Consent to Appointment of Guardian and Waiver of Notice</i>, or a <i>Declaration of Due Diligence</i>, for:</p> <ul style="list-style-type: none"> • Sierra Denney, sibling over age 12.
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	Clearances	X	
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 7/6/16
			Updates:
			Recommendation:
			File 17- Molina

18 The C & S Tsitouris Family Trust dated August 22, 2009 Case No. 16CEPR00512

Attorney **Dostalova-Busick, Alice M. (for Petitioner Sandra Tsitouris)**

Petition for Instructions and to Confirm the Revocability and Amendability of the C & S Tsitouris Family Trust

<p>Constantine Tsitouris DOD: 7/24/15</p>	<p>SANDRA TSITOURIS, Sole Surviving Trust Maker, Trustee and Beneficiary, is Petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
<p>Aff.Sub.Wit.</p>	<p>Petitioner states she and her spouse Constantine Tsitouris created the C&S Tsitouris Family Trust on 8/22/09 (Trust Makers). There have been no modifications or amendments to date. See Exhibit A. Upon his death, Petitioner became the sole trustee and beneficiary.</p>	<p><u>SEE ADDITIONAL PAGES</u></p>
<p><input checked="" type="checkbox"/> Verified</p>	<p>In order to properly administer the trust, Petitioner requests the Court confirm that the trust is a single trust for the benefit of the surviving Trust Maker and is fully revocable and amendable by the sole surviving Trust Maker.</p>	
<p>Inventory</p>		
<p>PTC</p>		
<p>Not.Cred.</p>		
<p><input checked="" type="checkbox"/> Notice of Hrg</p>		
<p><input checked="" type="checkbox"/> Aff.Mail</p>	<p>Petitioner states she has personal knowledge of the Trust Makers' joint intention in creating the trust. In particular, they created the trust to avoid the necessity of probate following each of their deaths. As such, they created a revocable trust which they believed was for their benefit during each of their lifetimes and would facilitate the transfer of assets without probate. Thus, it was the Trust Makers' understanding and intent that the trust assets would continue in a single or survivor's trust for the sole benefit of the surviving Trust Maker during his or her lifetime.</p>	
<p>Aff.Pub.</p>		
<p>Sp.Ntc.</p>		
<p>Pers.Serv.</p>		
<p>Conf. Screen</p>		
<p>Letters</p>		
<p>Duties/Supp</p>		
<p>Objections</p>		
<p>Video Receipt</p>		
<p>CI Report</p>		
<p>9202</p>		
<p>Order</p>	<p style="text-align: right;">x</p>	
<p>Aff. Posting</p>		
<p>Status Rpt</p>		
<p>UCCJEA</p>		
<p>Citation</p>		
<p>FTB Notice</p>		
		<p>Reviewed by: skc</p>
		<p>Reviewed on: 7/6/16</p>
		<p>Updates:</p>
		<p>Recommendation:</p>
		<p>File 18- Tsitouris</p>
	<p><u>SEE ADDITIONAL PAGES</u></p>	

Section Three of the Trust states: "THIRD: RESERVATION AND GRANT OF RIGHTS AND PRIVILEGES. The Trust Makers specifically reserve and grant the following rights and privileges: A. During the lifetime of the Trust Makers, this trust may be altered, amended, or revoked in whole or in part...." (Trust Agreement, p. 1).

The express language of the trust states that during their lifetimes, and Sandra is still living, the trust may be altered, amended, or revoked. Moreover, the law states that unless a trust is expressly made irrevocable by the trust instrument, the trust is revocable by the settlor (Probate Code §15400). That is the case here where there is no express statement in the trust document that any portion becomes irrevocable at the first Trust Maker's death.

Thus, based on the foregoing, Sandra is requesting the Court to confirm that the Trust is revocable and amendable by her as the surviving Trust Maker, and is for her sole benefit during her lifetime, as was contemplated and intended by the Trust Makers when the Trust was created.

The law recognizes the Court's equitable power to address a drafter's error and reform the instrument so as to conform to the settlor's intentions. See petition for citation. Here, the Trust Makers created a Trust document. They did not seek assistance of professionals and as a result the typical administrative provisions found in trusts following the first Trust Maker's death are missing. Petitioner is now requesting the Court's assistance to correct the drafting error and confirm the Trust Makers' intent that the trust is a single, survivor's trust that is for Petitioner's sole benefit during her lifetime, and that she retains all of the rights and powers to amend and revoke the trust.

Petitioner is the sole beneficiary during her lifetime. Following her death, Sandra and Constantine's children are contingent remainder beneficiaries. Petitioner lists the names and addresses of the persons entitled to notice as: Ambra and Jeffrey Wright of Magalia, CA (Petitioner's daughter and son-in-law), and Petitioner's step-sons Eric Tsitouris, of Port Orchard, WA, Joshua Tsitouris, incarcerated in San Luis, AZ, and Ethan Tsitouris, a minor, c/o Mary Jo Sterling, in Flagstaff, AZ.

Petitioner prays for an order:

1. Confirming that the trust is a single, survivor's trust;
2. Confirming that the trust is for Petitioner's sole benefit during her lifetime;
3. Confirming that Petitioner has the power to amend, revoke, or alter the trust in whole or in part;
and
4. For such other orders that the Court may deem proper.

SEE ADDITIONAL PAGES

18 The C & S Tsitouris Family Trust dated August 22, 2009 Case No. 16CEPR00512

Page 3 - NEEDS/PROBLEMS/COMMENTS:

1. Need clarification re Fresno as proper venue and place of administration per §§ 17002, 17005. It appears Petitioner resides in Magalia, CA, which is Butte County. All other interested persons reside in Magalia, Washington, or Arizona. The trust was executed in Hanford CA, which is Tulare County, and appears to contain real property in Hanford and in Yuba City, CA, which is Sutter County.
2. Notice was sent to the decedent's minor son Ethan Tsitouris directly; however, it does not appear that a separate copy was sent to the person having custody of him, with whom he resides, which appears to be Mary Jo Sterling, according to the petition. The Court may require continuance for proper notice to Ms. Sterling pursuant to Cal. Rule of Court 7.51(d).
3. Need order. Local Rules 7.1.1.F, 7.6.

Petition to Determine Succession to Real Property

DOD: 10/16/07	ESTHER YANEZ , daughter, is petitioner.		<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> #5 of the petition was not answered whether or not the decedent died testate or intestate. Need date of death of deceased spouse. Local Rule 7.1.1D.
	40 days since DOD.		
	No other proceedings.		
Cont. from	Decedent died testate?/intestate?		
<input type="checkbox"/> Aff.Sub.Wit.	I & A - \$145,000.00		
<input checked="" type="checkbox"/> Verified	Petitioner requests Court determination that Decedent's 100% interest in real property located in Fresno passes to her pursuant to intestate succession.		
<input checked="" 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.			
<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: KT
			Reviewed on: 7/6/16
			Updates:
			Recommendation:
			File 19- Yanez

Petition to Determine Interest in Property

Ameliafrances Paul DOD: 5/14/15	CYNTHIA OLIPHANT , Co-Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Consent of Co-Trustee DONNA THERESA AMELIA MATTERN to the relief sought in the petition was filed on 6/28/16.	1. No exhibits are attached to the petition as referenced. Need copy of trust, including Schedule A.
	Petitioner states Ameliafrances Paul (the settlor) created the trust on 6/12/08. See Exhibit 1. The settlor died 5/14/15. Pursuant to Section 3.03 of the trust, upon the decedent's death, Petitioner and her sister became successor co-trustees.	
	In Section 1.03(a) of the trust, the decedent provided that the property described in Schedule A is conveyed to the trustee. The decedent also executed a pour-over will, attached at Exhibit 2.	
	Despite specifically referencing the real property on Mansionette in Fresno, title at the decedent's death remained vested in the decedent's individual name.	
	With reference to Estate of Heggstad, Petitioner states it was decedent's intention that the Mansionette property be held, administered and distributed under the terms of the trust and Petitioner alleges that it is not subject to probate administration.	
	Petitioner requests an order that:	
	<ol style="list-style-type: none"> 1. Ameliafrances Paul transferred the Mansionette Property to the trust by means of assignment; 2. Confirming Cynthia Oliphant and Donna Theresa Amelia Mattern as Co-Trustees of the Trust are the owners of the Mansionette Property; 3. Authorizing and directing Petitioner to execute any documents necessary to complete the conveyance or transfer of the property to the trustees; and 4. For all other orders the Court deems just and proper. 	
<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 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: skc
		Reviewed on: 7/6/16
		Updates:
		Recommendation:
		File 20- Paul

Petitioner Rodriguez, Christina (Pro Per – Paternal Grandmother – Petitioner)

Status RE: Appointment of Temporary Guardian

	GENERAL HEARING CONT. TO 7/25/16	NEEDS/PROBLEMS/COMMENTS:
	CHRISTINA RODRIGUEZ , Paternal Grandmother, filed a Petition for Guardianship of the four minors on 4/12/16 that was heard on 6/13/16.	
Aff.Sub.Wit.		
Verified	On 6/13/16, the Court set the matter for Status re Proof of ID on 6/20/16.	
Inventory		
PTC		
Not.Cred.	On 6/20/16, VALERIE SAINZ , Mother, was ordered to drug test immediately and the matter was continued to 7/5/16.	
Notice of Hrg		
Aff.Mail	Minute Order 7/5/16 states: The Court Investigator is ordered to interview the parties again including Elissa (Maternal Grandmother). The Court is interested to know the recommendation on whether the guardianship should be granted or if the children should stay with Elissa. Also, when was the last time Christina (Paternal Grandmother/Petitioner) had visited with the children and for how long. The Court would also be interested in the status of Christina's minor son being in a gang. There are to be no visits with the mother at this time. The children may visit with Christina at Elissa's house for 2 hours on Wednesday and Friday from 11-1 unless parties can mutually agree on a different time.	
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		
	The Court set this hearing on 7/12/16 re appointment of a temporary guardian.	
		Reviewed by: skc
		Reviewed on: 7/7/16
		Updates:
		Recommendation:
		File 22- Ortiz

Attorney Nikole E. Cunningham (for Petitioners Jake Gallinetti and Kathryn Gallinetti)

Petition for Appointment of Temporary Conservator of the Person

		TEMPORARY GRANTED EX PARTE EXPIRES 7/12/2016	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Pursuant to Probate Code 2250.2(c), need proof of five (5) court days' notice by personal service of the <i>Notice of Hearing</i> and a copy of the <i>Petition for Appointment of Temporary Conservator</i> for:</p> <ul style="list-style-type: none"> Sarah Gallinetti, proposed Conservatee, if Court does not excuse notice as Petitioners request. <p>2. Pursuant to the <i>Order on Ex Parte Application for Good Cause Exception to Notice</i> filed 7/1/2016, need proof of five (5) court days service by mail of the <i>Notice of Hearing</i> and a copy of the <i>Petition for Appointment of Temporary Conservator</i> for:</p> <ul style="list-style-type: none"> Central Valley Regional Center (CVRC). <p>~Please see additional page~</p>
		<u>GENERAL HEARING SET FOR 8/10/2016</u>	
Cont. from		JAKE GALLINETTI and KATHRYN GALLINETTI	
	Aff.Sub.Wit.	parents, are Petitioners.	
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
	Letters	X	
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report	X	
	9202		
	Order	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 7/6/16
			Updates:
			Recommendation:
			File 23- Gallinetti

NEEDS/PROBLEMS/COMMENTS, continued:

3. Item 14 of *Confidential Conservator Screening* form filed 6/30/2016 for both Petitioners does not include explanation in Attachment 14 as required.
4. Need proposed order and proposed letters, as those previously submitted were used to grant the temporary petition ex parte.