

Attorney Beckett, Steven K., of San Bernardino (for Petitioner/Trustee Inland Counties Regional Center, Inc., as Administrator of the Master Trust of California)
 Third Account and Report of Trustee; Petition for Approval of Trustee Fees; and for Allowance of Attorney Fees and Costs (P.C. 16063)

	INLAND COUNTIES REGIONAL CENTER INC. (ROBERT BRITTON as Trust Officer of the Master Trust of California), Trustee, is Petitioner.		NEEDS/PROBLEMS/COMMENTS: Note: Minute Order dated 8/1/2013 states in pertinent part that the Court approves one percent of the value of the trust assets. Therefore, based upon the Fee Schedule dated 2/14/2012 (a copy of which is not included in the Third Account but was obtained for review from the Second Account), the Trustee fees are \$1,000.00 on the first \$50,000.00 , 2.0% on the next \$250,000.00 , etc. It appears that since the Trust assets do not reach the 2.0% level, the Court authorized 1.0% of trust assets after the initial \$1,000.00 . ~Please see additional page~
	Account period: 4/1/2013 – 3/31/2015		
Cont. from	Accounting	- \$187,152.91	
Aff.Sub.Wit.	Beginning POH	- \$153,510.40	
Verified	Ending POH	- \$168,146.08 (all cash)	
Inventory	Attorney Fees	- \$1,592.50	
PTC	(per Declaration and itemization on Exhibit I filed 5/22/2015; for 12.10 hours at \$250/hr for attorney time and \$100/hr for paralegal time;)		
Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail	Attorney costs	- [\$86.00]	
Aff.Pub.	(court call appearance)		
Sp.Ntc.	Trustee Fees	- \$2,995.12 (paid)	
Pers.Serv.	(0.75% of trust assets until 6/30/2013; thereafter 1.0% of trust assets per Fee Schedule dated 2/14/2012 and taken in quarterly payments as authorized by Order Settling Second Account filed 8/22/2013;)		
Conf. Screen			
Letters			
Duties/Supp	Reimbursement to Trust-	\$1,096.83	
Objections	(represents Trustee fees of \$925.67 inadvertently taken during the First Account period due to Court denial of fees, plus an additional amount of \$171.16 that the Trust would have earned had the correct amount of Trustee fees been taken;)		
Video Receipt			
CI Report			
✓ 2620			
✓ Order	Bond	- Not required	
Aff. Posting	(Trust does not require bond for this Trustee)		
Status Rpt	Petitioner prays for an order:		
UCCJEA	1. Approving the Third Account and Report and acts by the Trustee as reflected in the account;		
Citation	2. Directing payment of attorney fees and costs;		
FTB Notice	3. Confirming payments to the Trustee in the amount of \$2,995.12 during this account period; and		
	4. Authorizing Petitioner to continue to follow the Fee Schedule dated 2/14/2012, and allowing Petitioner to take the annual trustee fees in quarterly payments.		
	Reviewed by: LEG		
	Reviewed on: 7/9/15		
	Updates:		
	Recommendation:		
	File 1 – Rogers		

NEEDS/PROBLEMS/COMMENTS, continued:

1. Local Rule 7.17(B)(5) provides that telephonic appearance costs are not reimbursable as the Court considers them part of the cost of doing business; therefore, the finding in paragraph 4 of the proposed order which violates the Local Rule has been stricken to remove the **\$86.00** payment to Attorney Beckett for reimbursement of CourtCall costs for the anticipated appearance at the hearing on the instant Third Account.

Note: Court will set a status hearing as follows:

- **Monday, May 22, 2017 at 9:00 a.m. in Dept. 303** (2-year account) for filing of the Fourth Account;

Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the dates listed, the hearing will be taken off calendar and no appearance will be required.

Dept. 303, 9:00 a.m. Monday, July 13, 2015

Tamara Jolene Carl and Paul Joseph Perez (GUARD/P)

Case No. 04CEPR00674

Petitioner Ricky Cruz Perez (Pro Per – Maternal Grandfather – Petitioner)
Petitioner Cruz Rosenda Perez (Pro Per – Maternal Grandmother – Petitioner)

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

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need UCCJEA (Form GC-120), which provides information regarding the minors' residence history and other pertinent information per Probate Code §§ 1510, 1512. 2. Need Notice of Hearing. 3. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: <ul style="list-style-type: none"> - Todd Carl (Tamara's father) - Paul Joseph Osuna (Paul's father) 4. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: <ul style="list-style-type: none"> - Tamara's Paternal Grandparents - Paul's Paternal Grandparents - Siblings age 12 or older <p><u>Note:</u> Petitioners list Judy Lyons as the paternal grandmother of both minors, but the minors have different fathers. Need clarification.</p>
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA	X	
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 7/9/15
			Updates:
			Recommendation:
			File 2 – Gonzalez & Perez

3 Raffi Leon George (Estate) Case No. 04CEPR01552
Attorney Simonian, Jeffrey D (for Leon Y. George and Armen L. George – Administrators)
Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for
Failure to File a First Account or Petition for Final Distribution

	LEON Y. GEORGE , father, and ARMEN L. GEORGE , brother, were appointed as Co-Administrators with Full IAEA without bond and Letters issued on 1-25-05.	NEEDS/PROBLEMS/COMMENTS: Minute Order of 06/15/2015: Counsel represents that the FTB is still processing the tax returns. The Court directs Counsel to file a declaration regarding the time estimates from the FTB and the IRS, as well as an updated status report for the 07/13/2015 hearing. 1. Need <u>Final</u> Inventory and Appraisal and First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Cont. from: 061515	Inventory and Appraisal Partial No. 1 was filed on 01/09/2015 indicating real property valued at \$160,000.00 and personal property valued at \$1,500.00.	
Aff.Sub.Wit.	Inventory and Appraisal Partial No. 2 was filed 04/20/2015 indicating personal property valued at \$139,728.83	
Verified	No accounting or petition for final distribution was ever filed pursuant to Probate Code §12200.	
Inventory	Minute Order of 04/20/2015 set this status hearing. Minute Order states: Mr. Simonian represents that he has the completed Final Inventory and Appraisal with him and he will file it directly after this proceeding. Mr. George requests 45 days; the OSC is vacated. If the petition is filed at least two court days prior, then no appearance is necessary on 06/15/2015.	
PTC	Status Report filed 6/12/15 for previous Status Hearing states the decedent's 2004 taxes have been completed and filed. The FTB and IRS are still processing the returns and are at present unable to provide information necessary for filing the petition for final distribution. Additional time is necessary to allow for processing of these returns so that the final tax liabilities of the decedent can be determined and to allow for resolution of the FTB claim. Mr. Simonian states removal of the surviving co-administrator at this time is not warranted and would most likely cause further delay in the closing of this estate.	
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		Reviewed by: LV
Status Rpt		Reviewed on: 07/07/2015
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 3 - George

Guardian Vasquez, Emma (pro per – maternal great-grandmother/Guardian)

Petitioner Mora, Juan (pro per – father)

Probate Status Hearing RE: Visitation

Age: 9	<p>EMMA VASQUEZ, maternal great-grandmother, was appointed as guardian on 01/24/08.</p> <p>JUAN MORA, father, filed a Petition for Termination of Guardianship on 07/28/14. The Petition for Termination was continued numerous times and ultimately denied on 04/27/15.</p> <p>Minute Order from hearing on 04/27/15 set this hearing regarding status of visitation and states: The Court orders the Court Investigator to personally re-interview the father, the guardian, and the minor, with no other party present, and provide an updated report about visitation.</p> <p>Court Investigator Jennifer Young filed a report on 06/11/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 06/15/15</p> <p>Minute Order from 06/15/15 states: The Ex Parte Petition to Reset the hearing is now moot. The Court orders that Mr. Mora have unsupervised visits with the minor every other Saturday from 10am to 4pm beginning 06/20/15. If these visits are successful, the court will consider starting overnight visits at the 07/13/15 hearing.</p>
Cont. from 061515		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>Reviewed by: JF</p> <p>Reviewed on: 07/07/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 4 - Mora</p>	

DOD: 09/20/2014	<p>ANTOINETTE HERNANDEZ, Daughter and Conservator of the Person and Estate with bond of \$12,000.00 and the remainder in blocked accounts, was appointed on 12/14/2010.</p> <p>Letters issued on 05/06/2011.</p> <p>Notice of Status Hearing filed 05/29/2015 set this status hearing regarding Termination of Proceeding for Deceased Conservatee.</p> <p>Clerk's certificate of mailing indicates that Antoinette Hernandez and G.L. Motsenbocker were mailed notice on 05/29/2015.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR</u> <u>Petition for Termination of Conservatorship filed 07/09/2015. Hearing set for 08/13/2015.</u></p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>Reviewed by: LV</p> <p>Reviewed on: 07/08/2015</p> <p>Updates: 07/09/2015</p> <p>Recommendation:</p> <p>File 5 – Archuleta</p>	

Petitioner

Real, Cassandra A. (pro per – non-relative)

Petitioner

Corrales, Tony (pro per – brother)

Petition for Appointment of Guardian of the Person

Age: 16	<p>TONY CORRALES, brother, and CASSANDRA REAL, non-relative (brother's girlfriend), are Petitioners.</p> <p>DOLORES PEREZ, maternal aunt, was appointed guardian on 11/01/12 – <i>personally served on 05/21/15</i></p> <p>Father: PEDRO GARCIA - <i>deceased</i></p> <p>Mother: RUBY ZERMENO – <i>personally served on 05/21/15</i></p> <p>Paternal grandparents: NOT LISTED</p> <p>Maternal grandfather: RUBEN CORRALES – <i>deceased</i></p> <p>Maternal grandmother: YVONNE RIOS</p> <p>Petitioner states that the current guardian's health is bad and she can't care for Martin anymore. Temporary guardianship is needed for medical care and school.</p> <p>Court Investigator Julie Negrete filed a report on 07/06/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Letter from Dolores Perez (current guardian) attached to petition supports Petitioner's petition to become successor guardians.</p> <ol style="list-style-type: none"> Need proof of service at least 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</i> or <i>Consent & Waiver of Notice</i> or <i>Declaration of Due Diligence</i> for: <ol style="list-style-type: none"> Martin Garcia (minor) – <i>personal service</i> Paternal grandparents – <i>service by mail ok</i> Yvonne Rios (maternal grandmother) – <i>service by mail ok</i>
Cont. from 060815		
<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 type="checkbox"/> Aff.Mail	x	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	x	
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 07/07/15
		Updates:
		Recommendation:
		File 7A - Garcia

Age: 16	CASSANDRA REAL , non-relative (brother's girlfriend), is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i> re Petition for Termination of Guardianship. 2. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Termination of Guardianship</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: <ol style="list-style-type: none"> a. Martin Garcia (minor) b. Dolores Perez (current guardian) c. Ruby Zermeno (mother) d. Paternal grandparents e. Yvonne Rios (maternal grandmother) f. Tony Corrales (brother)
	DOLORES PEREZ , maternal aunt, was appointed guardian on 11/01/12	
Cont. from	Father: PEDRO GARCIA - <i>deceased</i>	
<input type="checkbox"/> Aff.Sub.Wit.	Mother: RUBY ZERMENO	
<input checked="" type="checkbox"/> Verified	Paternal grandparents: NOT LISTED	
Inventory	Maternal grandfather: RUBEN CORRALES – <i>deceased</i>	
PTC	Maternal grandmother: YVONNE RIOS	
Not.Cred.	Sibling: TONY CORRALES	
Notice of Hrg <input checked="" type="checkbox"/>	Petitioner states that the current guardian's health is bad and she can't care for Martin anymore.	
Aff.Mail <input checked="" type="checkbox"/>	Court Investigator Julie Negrete filed a report on 07/06/15.	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
<input checked="" type="checkbox"/> CI Report		
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 07/07/15
		Updates:
		Recommendation:
		File 7B - Garcia

Jack N. Allen, Jr. (Special Needs Trust) Case No. 12CEPR00826
Beckett, Steven K. (for Inland Counties Regional Center, Inc.)
Second Account and Report of Trustee; Petition for Approval of Trustee Fees; and for
Allowance of Attorney Fees and Costs

		INLAND COUNTIES REGIONAL CENTER, INC., Trustee, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Petitioner includes values for <u>unrealized</u> gains and losses in calculation of the charges for this account. This appears improper, as these figures represent market value fluctuation rather than carry value. See Probate Code §1061 which clarifies that property on hand must be stated at carry value, and §1063, which requires separate schedule for market values. The Court may require clarification or authority for use of these figures or amended account.</p> <p>2. The Court may require a more detailed description of the trustee's services rendered and itemization of time spent in performance of the trustee's duties pursuant to Cal. Rule of Court 7.776(6) and 7.903(c)(8) and Probate Code §2646.</p> <p>3. Local Rule 7.17.B.5. effective 1/1/15 disallows reimbursement of telephonic appearance costs as a cost of doing business and not reimbursable. The Court may disallow the \$86 requested.</p>
		ROBERT BRITTON , Trust Officer, Master Trust of California, verified the petition.	
		Account period: 11/1/13 – 2/28/15	
		Accounting: \$108,017.43	
		Beginning POH: \$104,074.26	
		Ending POH: \$100,428.96 (cash)	
		Trustee: \$1,295.46 (1% of the funds held in the trust in quarterly fees)	
		Attorney: \$1,697.50 (for 2.55 attorney hours @ \$250/hr, including 1 hour estimated for court appearance, and 10.6 paralegal hours @ \$100/hr, including 1 hour estimated time for preparation of Notice of Hearing, itemized per declaration)	
		Costs: \$86.00 (CourtCall appearance)	
		Petitioner states Petitioner had been using the new fee scheduled dated 2/14/12 on other special needs trusts being administered by Petitioner and inadvertently followed the new fee schedule on this case for the fourth quarter 2013, first quarter 2014, and second quarter 2014 even though the new fee schedule was not approved by the court. The trust has been refunded the difference of \$794.96, which will be reflected in the next account period. There are no individual account statements because this is a pooled investment fund; therefore, a breakdown of trustee fees is provided in a table in the petition at Page 5. Petitioner requests authority to allow Master Trust of California to continue taking trustee fees in the amount of 1% of the trust assets in quarterly trustee fees.	
		SEE PAGE 2	
	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		
	2620	X	
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			<p>Reviewed by: skc</p> <p>Reviewed on: 7/8/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 8 – Allen</p>

Page 2

Petitioner requests that:

1. This account be settled, allowed and approved;
2. All acts and transactions of the trustee as set forth in this account and report or relating to the matters set forth therein be ratified, confirmed and approved;
3. The Court authorize Petitioner to pay its attorney, Steven K. Beckett, the sum of \$1,697.50 from Jack N. Allen, Jr.'s trust funds held by Master Trust of California for legal services rendered to the trust estate during the accounting period;
4. The Court authorize Petitioner to pay its attorney, Steven K. Beckett, the sum of \$86.00 from Jack N. Allen, Jr.'s trust funds held by Master Trust of California for advanced costs of administration;
5. The Court approve payment of \$2,272.29 as trustee fees paid to Master Trust of California which had been approved but unpaid during the last accounting period;
[Examiner's Note: This payment was approved in the Court's Order filed 7/8/14.]
6. The Court approve payment of \$1,295.46 as trustee fees paid to Master Trust of California during this accounting period and that the additional \$794.96 in trustee fees that were inadvertently taken shall be refunded to the trust and be reflected in the next accounting period;
7. That Petitioner be authorized to continue taking 1% of the trust assets in quarterly trustee fees; and
8. Other relief that the Court considers proper.

	JOYCE V. DAVIS , Sister and Conservator of the Person and Estate with bond of \$333,000.00, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Petitioner requests to sell the conservatee's real property and vehicle because funds are needed for her upkeep.	Minute Order 3/25/15: Counsel reports that he has been retained by Ms. Davis. Mr. Bickel is in agreement with coming in as conservator of the estate. Counsel will be filing a corrected I&A and a Third Amended First Account.
Cont. from 093014, 102214, 121014, 032515, 061515	<u>Note:</u> The vehicle referred to in this petition has not been inventoried as an asset of the conservatorship estate.	Note: A Corrected I&A was filed 5/7/15. A Second Corrected I&A was filed 6/15/15.
Aff.Sub.Wit.		Note: A Third Amended First Account filed 7/8/15 is set for hearing on 8/13/15.
Verified		The following issues remain noted for reference only:
Inventory		<u>SEE PAGE 2</u>
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		Reviewed by: skc
Order		Reviewed on: 7/7/15
Aff. Posting		Updates: 7/8/15
Status Rpt		Recommendation:
UCCJEA		File 9A - Thomas
Citation		
FTB Notice		

NEEDS/PROBLEMS/COMMENTS:

1. Petitioner's First Account filed 5-15-14 was not in compliance with applicable law, and was denied on 6-24-14. This "Petition for Instructions" filed 8-18-14 requests authority to sell various assets; however, it does not contain the information necessary for the Court to consider this type of request. Further, the Court may require the First Account to be settled before authorizing further action by the Conservator. See Probate Code §§ 1020, 1060, 2540, 2620, Cal. Rules of Court 7.575, Local Rule 7.1.1.C., and other applicable law and rules. Specifically, §2540 requires that the sale be discussed with the Conservatee.
2. Based on the Inventory and Appraisals that have been filed, Petitioner's bond of \$333,000.00, based on her original estimate, is insufficient. Petitioner is reminded of her duty to increase bond pursuant to Cal. Rules of Court 7.204. Examiner calculates the appropriate bond amount to be \$502,194.24, not including the house, and also not including the vehicle that Petitioner refers to, because it has not been inventoried as an estate asset. If the house and vehicle are authorized to be sold, the bond amount will need to be adjusted accordingly.
3. The Conservatee is entitled to notice of this petition. See Probate Code §1460. (Note: Petitioner mailed notice of the amended account at Page B to the Conservatee, but not this petition.)

Second Amended Account and Report of Conservator and Petition for its Settlement

	<p>JOYCE V. DAVIS, Sister and Conservator of the Person and Estate with bond of \$333,000.00, is Petitioner.</p>		<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p><u>OFF CALENDAR</u> Third Amended First Account filed 7/8/15 is set for hearing on 8/13/15.</p> <p>Note: Petitioner filed this petition in pro per; however, she is now represented by Melvin Rube.</p> <p>Status Report filed 6/11/15 by Mr. Rube states he has drafter the Third Amended First Account, but is unable to complete it at this time because the charges and credits do not balance. Mr. Rube requests an additional 30 days.</p> <p>Minute Order 6/15/15: The Court orders bond increased to \$502,194.24. Continued to 7/13/15.</p> <p>Update: On 6/15/15, a Second Corrected I&A was filed; however, no Third Amended First Account has been filed yet.</p> <p>The following issues remain noted for reference only:</p> <p style="text-align: center;"><u>SEE PAGE 2</u></p> <p>Reviewed by: skc</p> <p>Reviewed on: 7/7/15</p> <p>Updates: 7/8/15</p> <p>Recommendation:</p> <p>File 9B – Thomas</p>
	<p>Account period: 3-14-13 through 3-14-14</p> <p>Accounting: \$866,751.47 Beginning POH: \$ 11,334.12 Ending POH: \$780,811.53</p>		
	<p>Conservator: No compensation requested</p>		
	<p>Petitioner states the conservatee's automobile has not been sold. The car was used to transport the Conservatee and her six dogs to the veterinarian and to the pet store for food. The car has only been driven by the Conservator's husband with the Conservatee for this purpose. He took the car in for all recalls and maintenance. The insurance company was notified that the conservatee's (sic) husband would be the only authorized driver. The vehicle will be sold as soon as Conservator can obtain the pink slip. The DMV will not issue a new pink slip. The Conservatee did not file the Lien Satisfied/Legal Owner/Title Holder Release with the DMV. The vehicle was paid off several years ago, and the conservator wrote to Toyota, but has had no response. Conservator will follow up on this.</p>		
	<p>Petitioner states the home located in Chino Hills, CA, was in need of major cleanup and repairs due to Conservatee living there for years with health issues. Conservator has secured the property and has begun cleanup and hopes to sale the house because Conservatee will be unable to return to her home in the future. Funds will be used for her placement at Somerford Place. The condition of the house prevents it being rented, and there is no income being generated from the property. No furniture or furnishings have been sold or removed from the house. Conservator has begun to contact auctioneers and antique dealers.</p>		
	<p>Petitioner requests that the First Account be settled, allowed, and approved as filed, and all acts and proceedings of Petitioner be confirmed and approved.</p>		
	<p>Cont from 121014, 032515, 061515</p>		
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w/o	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters	3-22-13	
	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	2620(c)		
	Order	x	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

NEEDS/PROBLEMS/COMMENTS:

1. Petitioner's Summary of Account states the beginning Property On Hand was \$11,334.12; however, it is unclear what this figure represents, as there is no schedule showing Beginning Property on Hand. The I&A and Supplemental I&A totaled \$781,540.22, of which \$397,060.22 was cash. That should be the beginning Property On Hand figure.

Further, the Summary then indicates \$20,000.64 in additional property received, \$55,189.81 in regular receipts, \$501.04 in gains, and \$779,725.86 as "other charges," which are all similarly unclear.

Further, it appears that many of the assets Petitioner originally categorized as "cash" are now categorized as "non-cash" in the Ending Property on Hand, and if that is the case, those assets require appraisal by the Probate Referee. See Probate Code §8900 et seq. This includes the characterization and appraisal of the retirement account and various insurance policies.

Need further amended account pursuant to §1060 et seq., and possibly amended I&A pursuant to §8900 et seq. Petitioner is strongly encouraged to seek assistance from an attorney going forward, as it continues to appear that non-attorney document services are not meeting her needs.

2. As noted on Page A, Petitioner's bond appears insufficient. However, it appears clarification regarding #1 is necessary above in order for to confirm an appropriate bond calculation. As noted on Page A, Examiner calculates that bond should be at least \$502,194.24, not including the house (because the Conservator does not currently have authority to sell the house) and not including the vehicle (because it was not inventoried as an asset of the conservatorship estate). Petitioner is again reminded of her duty to apply for increase in bond when appropriate pursuant to Cal. Rule of Court 7.204.
3. Petitioner's descriptions of various expenses are not sufficient to determine what the expenses were for. Specifically: "SIGNON" on 3-18-13, "AT HM REWA" on 3-26-13, and "PWA" on 4-15-13. Please note: Petitioner's other disbursements at various stores such as Costco and Target are similarly unclear; however, Petitioner provided pages and pages of copies of receipts thereafter. For future reference, copies of receipts are unnecessary and serve to add bulk and confusion to the accounting document. If properly prepared, receipts are unnecessary because the accounting should simply provide adequate descriptions of the transactions in the schedules. The only required documentation are bank statements and care facility statements pursuant to Probate Code §2620, unless otherwise requested by the Court.
4. The Disbursements Schedule indicates two donations to Greenpeace totaling \$100.00 in March and April 2013. The Court may require clarification with reference to Cal. Rule of Court 7.1059 (Standard of Conduct for Conservators of the Estate), specifically (b)(3), which prohibits making gifts with conservatorship estate funds without authorization.

11 Michael Josiah Robles (GUARD/P)

Case No. 13CEPR00697

Attorney Hopper, Cindy J (for Christina Williams – Petitioner – Mother)

Objector Robles, Sharon (Pro Per – Guardian)

Petition for Termination of Guardianship

Age: 5		<p>CHRISTINA WILLIAMS, mother, is petitioner.</p> <p><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition Termination for:</p> <ul style="list-style-type: none"> Michael Robles (Father) <p>For Objector:</p> <p>1. It does not appear that the Objection filed 07/02/2015 was served on Attorney Cindy J. Hopper, counsel for Christina Williams, petitioner. Need proof of service on Objection.</p>
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail w/		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv. w/		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
Reviewed by: LV			
Reviewed on: 07/09/2015			
Updates:			
Recommendation:			
File 11 – Robles			

12 Zachery Mahala & Brett Mahala (GUARD/P) 13CEPR00716

Petitioner Hardin, Tammy (Pro Per – Mother)

Petition for Termination of Guardianship

Zachery Age:15	TAMMY HARDIN, mother, is petitioner.	NEEDS/PROBLEMS/COMMENTS:	
Brett Age:13			
	<u>Please petition for details</u>	<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 of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Chester Smith (Guardian/Maternal Grandfather) • Cathy Smith (Guardian/Maternal Grandmother) • Robert Mahala (Father) • Wayne Hurley (Paternal Grandfather) • Zachary Mahala (Minor) • Brett Mahala (Minor) • Jacob Moretz (Sibling) 	
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			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: 07/08/2015	
		Updates:	
		Recommendation:	
		File 12 - Mahala	

	Carol Mattox is Executor.	NEEDS/PROBLEMS/COMMENTS: 1. Need informal accounting of \$5,400.00 reserve.	
	Executor's Petition for Final Distribution was granted on 12/15/14, including a closing reserve of \$5,400.00.		
Cont. from 060115			
Aff.Sub.Wit.	Consistent with the Court's recent practice, the Court set this status hearing for the filing of an informal accounting of the closing reserve amount at the hearing on 12/15/14.		
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			Status Report filed 5/20/15 states the tax returns for the estate are not due until 6/15/15; therefore, the taxes, accounting fees and related costs have not yet been determined or paid. Mr. Dowling respectfully requests an additional 45 days to file the informal accounting.
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report	Status report filed 6/30/15 states that due to illness of both the accountant for the estate and the executor, an extension on the taxes had to be filed. Therefore, taxes, accountant's fees and related closing costs have not yet been determined. Attorney Matlak requests the Court extend the time for filing the informal accounting for 60 days.		
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: skc	
		Reviewed on: 7/7/15	
		Updates:	
		Recommendation:	
		File 13 - Gover	

Petitioner Moreno, Rosemary (pro per – paternal grandmother/Guardian)

Petitioner Moreno, Victoria (pro per – paternal aunt)

Petition - Appoint Guardian

Age: 9	ROSEMARY MORENO and VICTORIA MORENO , paternal grandmother/guardian and paternal aunt, are Petitioners.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 06/08/15</u></p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person or Consent & Waiver of Notice for: <ol style="list-style-type: none"> a. Maternal grandparents – Declaration of Due Diligence filed 06/08/15 states that the maternal grandparents are unknown and the mother will not provide information regarding their names and addresses
	ROSEMARY MORENO , paternal grandmother, was appointed guardian of Aaron on 11/13/13.	
Cont. from 060815	Father: VICENTE MORENO – Consent & Waiver of Notice filed 04/06/15	
Aff.Sub.Wit.	Mother: MARGIE MORALES-MIRELES - Consent & Waiver of Notice filed 04/06/15	
✓ Verified	Paternal grandfather: DECEASED	
Inventory	Maternal grandparents: UNKNOWN – Declaration of Due Diligence filed 06/08/15	
PTC	Petitioners state [see Petition for details].	
Not.Cred.	Court Investigator Samantha Henson filed a report on 06/02/15.	
Notice of Hrg	Sacramento County Court Investigator Lindsay Wainscott filed a report on 06/12/15.	
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: 07/08/15
		Updates:
		Recommendation:
		File 14 - Moreno

Petition to Determine Ownership of Estate Property and for Order Authorizing and Directing Successor Administrator to Transfer Estate Property to Petitioner

DOD: 02/18/10	DAVID J. EDWARDS , former spouse and former Administrator, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 06/15/15 Minute Order from 06/15/15 states: Mr. Rube represents that additional declarations will be filed; he requests 30 days.</u></p> <p>On 7/9/15, Mr. Rube filed a status report along with declarations in support from David J. Edwards and Margot Bellando. Status report states that based on the declarations and further discussion with Ms. Johnson, he believes parties can reach settlement and requests a short mandatory settlement conference with the court at the earliest opportunity.</p> <p style="margin-left: 40px;">1. Need Order.</p>
	Petitioner states that Decedent died in possession of \$108,957.43 consisting of 4 cashier's checks made payable to Jeanee Girazian. All 4 checks escheated to the State of California and were held by the Controller and were obtained from the Controller by the Successor Administrator, Bruce Bickel on or about 11/25/14 and Mr. Bickel now has these assets in his possession.	
Cont. from 031615, 061515		
<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	Petitioner claims that \$108,957.43 of the \$108,977.67 currently in possession of Bruce Bickel belongs to him. From 1961 through 03/31/12, Petitioner was a physician and surgeon practicing medicine at his medical practice called Sunnyside Medical. Decedent was employed by Petitioner from approximately 1994 through April of 2004 as the office manager for Sunnyside Medical. Her duties included managing Petitioner's accounts receivable and accounts payable, billing, paying bills and compiling financial information for Petitioner's accountant. Decedent and Petitioner were also married from 12/31/98 until the marriage was annulled on 03/22/04. At no time while Decedent was employed by or married to Petitioner did Decedent have or acquire an ownership interest in Sunnyside Medical or in any of its assets. Petitioner authorized the Decedent as office manager of Sunnyside Medical to establish and manage bank accounts in decedent's name along with Petitioner. Petitioner expected that the Decedent would make notations on the bank accounts that the funds were held in trust for Sunnyside Medical and that said bank accounts were to be funded only Petitioner's income derived from Sunnyside Medical.	
<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 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		

Continued on Page 2

Pursuant to Petitioner's authorization, decedent opened two Citibank accounts under the name Jeanee Girazian with Sunnyside Medical's mailing address, another Citibank Account under the name Jeanee Girazian, DBA Sunnyside Medical also with Sunnyside Medical's mailing address and a Bank of America Account under the name Sunnyside Medical Jeanee Girazian. Decedent, as the office manager of Sunnyside Medical, had petitioner's consent and permission to issue and sign checks on all of these accounts.

In November 2013, Decedent caused three cashier's check totaling \$78,957.45 to be made payable to herself from these bank accounts without Petitioner's knowledge or consent and in April 2004 Decedent caused another cashier's check in the amount of \$30,000.00 to be made payable to herself without Petitioner's knowledge of consent. The accounts from which these checks were drawn were funded solely with Petitioner's income derived from his medical practice and his other investment sources and Petitioner used these accounts to pay the vendors of his medical practice, pay his personal expenses, pay his payroll and other related expense.

These 4 cashier's checks were not discovered by Petitioner until after Decedent's death on 02/18/10, some 6 years after the checks were issued to Decedent. The cashier's checks were purchased with funds from the bank accounts established for Sunnyside Medical and are therefore the property of Petitioner and not of Decedent's estate.

Petitioner prays for an Order:

1. Directing Bruce Bickel, the Successor Administrator of the Estate of Jeanee Girazian aka Sandra Jean Girazian, aka Jeanee Girazian Edwards, to distribute the sum of \$108,957.43 to Petitioner David J. Edwards.

Objection to Petition to Determine Ownership of Estate Property and for Order Authorizing and Directing Successor Administrator to Transfer Estate Property to Petitioner filed 03/12/15 admits and denies various aspects of the Petition and asserts affirmative defenses.

Status Report of Successor Administrator Bruce D. Bickel filed 06/09/15 states: At the hearing on 03/16/15, the Court continued the hearing for 90 days to allow counsel to confer regarding the Petition and for the Petitioner to have an opportunity to provide to Mr. Bickel additional information concerning Petitioner's basis for his claim of ownership of the cashier's checks. The attorneys have conferred regarding Dr. Edwards' Petition. Mr. Rube has requested an additional period of time to file a supplemental declaration on behalf of Dr. Edwards in order to provide the Court and Mr. Bickel additional information regarding the basis for Dr. Edwards' claim of ownership of the cashier's checks. Mr. Bickel is in agreement with the requested continuance.

Status Report of Melvin K. Rube filed 06/10/15 states: he has been in settlement discussions with Summer Johnson, counsel for Bruce Bickel, the successor administrator in this case. It is felt that this case can be resolved with the filing of supplemental declarations by David J. Edwards and Margot Bellando. Petitioner therefore requests a 30 day continuance in which to file requested supplemental declarations.

Status Report of Melvin K. Rube filed 06/10/15 states: Since the last hearing, respondents have submitted three settlement proposals. Petitioner has countered with two counter-proposals and rejected the third proposal. Petitioner therefore requests that this matter be set for a court trial. Petitioner estimates 3 days for trial.

Status Report of Counsel for Successor Administrator Bruce Bickel filed 07/08/15 states: The parties met prior to the 06/15/15 hearing and counsel for Dr. Edwards provided Declarations of Dr. Edwards and his office manager in further support of Dr. Edwards' Petition to Determine Ownership of Estate Property, etc. It is believed that the parties are close to a settlement framework. The parties believe that a 1-2 hour settlement conference with the court would be beneficial to resolving this issue.

Probate Status Hearing RE: Other Monies Not Yet Accounted For

DOD: 4/28/89	<p>FREMON GRAVES, Son-in-law, was appointed as Special Administrator on 8-27-14 with authorization to obtain a settlement check from the Black Farmers' Discrimination Litigation Claims Administrator and deposit same into a blocked account (\$62,500.00, later determined to be \$50,00.00)</p> <p>Mr. Graves was removed at the status hearing on 2-2-15 and the FRESNO COUNTY PUBLIC ADMINISTRATOR was appointed Special Administrator.</p> <p>At the hearing on 4/27/15, Mr. Graves represented to the Court that he has a cashier's check in the amount of \$35,000.00 in his possession. The Court ordered Mr. Graves to deliver said check to the Public Administrator's office.</p> <p>The Court set this status hearing re other monies not yet accounted for.</p> <p>Status Report filed 5/28/15 states Mr. Graves did turn over the \$35,000.00 check over to the PA on 4/27/15; however, as of this date, he has not provided any explanation of the \$15,000.00. Therefore, the PA believes the only way to proceed at this point is to file a surcharge against him.</p> <p>Fremon Graves filed a Declaration on 7/8/15 that contains a description of his monthly income and expenses and letters from him and his sons.</p>	NEEDS/PROBLEMS/COMMENTS:
Cont. from 060115		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 7/7/15
		Updates: 7/8/15
		Recommendation:
		File 16- Logan

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

DOD: 2-2-14		RUTH ORONA , Daughter, is Petitioner	NEEDS/PROBLEMS/COMMENTS: 1. Petitioner's signature/verification of this petition is not dated. 2. Need date of death of deceased spouse. Local Rule 7.1.1.D. 3. There is no Inventory and Appraisal with this petition pursuant to Probate Code §13152(a)(2). An I&A indicating a total estate value of \$100,000.00 was attached to a prior petition filed 12/2/14, which was denied. The Court may require a new I&A to be filed in connection with this new petition.
		40 days since DOD	
		I&A: \$100,000.00 (residential real property in Fresno) (See #3)	
✓	Aff.Sub.Wit.		
✓	Verified	X	
✓	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		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc Reviewed on: 7/8/15 Updates: Recommendation: File 8 - Bernal

Probate Status Hearing RE: Proof of Bond

DOD: 1/29/15		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Bond filed 6/18/15, Letters issued.</p>
Cont. from 061515		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 7/7/15
		Updates:
		Recommendation:
		File 18 – Dickinson

19A Robert Andrew Yost, Jr. (GUARD/P)

Case No. 15CEPR00276

Attorney: Mary Castro-Ayala (for Petitioner Karen Yost)

Mother: Yesinia Guzman (pro per)

Attorney: Rosemarie Rusca (for Roger Yost and Kali Yost)

Petition for Appointment of Guardian of the Person

		<u>TEMPORARY EXPIRES 7/13/15</u>	NEEDS/PROBLEMS/COMMENTS: 1. Order is incomplete. Need proposed order that is completely filled out.
		KAREN YOST , paternal grandmother, is petitioner.	
Cont. from 033015, 042715, 051915		Please see petition for details.	
	Aff.Sub.Wit.	Objections to Guardianship filed by mother, Yesenia Guzman, on 3/30/15.	
✓	Verified	Supplemental Declaration of Petitioner, Karen Yost, filed on 5/12/15	
	Inventory	Court Investigator, Julie Negrete's Report filed on 5/11/15	
	PTC	Visitation Order dated 6/12/15.	
	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: 7/7/15
			Updates:
			Recommendation:
			File 19A – Yost

19A

Petition for Appointment of Guardian of the Person

		ROGER YOST , paternal grandmother, and KALI YOST , paternal aunt, are petitioners.	NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 2. Need proof of personal service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: a. Yesenia Guzman (mother) 3. Need proof of service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: a. Karen Yost (paternal grandmother) b. Angie (maternal grandmother)
		Please see petition for details.	
Cont. from		Declaration of Kali Yost in support of petition for appointment of co-guardians of the person filed on 5/12/15	
<input type="checkbox"/>	Aff.Sub.Wit.	Responsive Declaration of Karen Yost filed on 6/23/15	
<input checked="" type="checkbox"/>	Verified	Reply Declaration of Roger Yost filed on 7/7/15	
<input type="checkbox"/>	Inventory	Court Investigator Julie Negrete's Report filed on 7/6/15	
<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.	X	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input 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 checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 7/7/15
			Updates:
			Recommendation:
			File 19B – Yost

20
 Attorney
 Attorney
 Attorney

Glen A. Webster (CONS/PE)
 LeVan, Nancy J. (for Ginger Webster – Daughter – Petitioner)
 Adams, Jon P. (for A. Daryl Webster – Son – Objector)
 Istanboulian, Flora (Court appointed for proposed Conservatee)

Case No. 15CEPR00446

Petition for Appointment of Probate Conservator of the Person and Estate

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> Petitioner resides in Keifer, OK. Court Investigator advised rights on 5/27/15 Voting rights affected – need minute order <u>Continued from 6/8/15. See Minute Order of 6/8/15 re visitation.</u> <u>Update:</u> Objection was filed 7/8/15 by A. Daryl Webster. 1. If granted, need bond of \$277,935.90. 2. Pursuant to Probate Code §2352, a petition to fix residence outside the State of California may be necessary if Petitioner intends to move Mr. Webster to Oklahoma, and a conservatorship or its equivalent will need to be commenced there.	
Cont. from 060815				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			W
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
✓	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
		Reviewed by: skc		
		Reviewed on: 7/7/15		
		Updates: 7/9/15		
		Recommendation:		
		File 20A - Webster		

Petitioner Kenneth Eugene Barger (Pro Per Petitioner, son)

Petition for Probate of Will and for Letters Testamentary

DOD: 4/9/2015	KENNETH RALPH BARGER , son and named Executor without bond, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 6/8/2015. Minute Order states examiner notes are handed to Mr. Barger in open court. Mr. Barger is admonished not to sell any property before the Court approves the petition.</p> <p>The following issues from the last hearing remain:</p> <ol style="list-style-type: none"> 1. Need copy of the Will to be attached to the <i>Petition</i> as <i>Attachment 3e(2)</i>. [Note: Original Will was deposited on 4/29/2015.] 2. Decedent's Will is not self-proving. Need <i>Proof of Subscribing Witness</i> to the will pursuant to Probate Code § 8220. 3. Need <i>Notice of Petition to Administer Estate</i> and proof of mailed notice pursuant to Probate Code § 8110 for SHIRLEY DIANE STINEBISER, daughter. (Note: Waiver of Bond filed 6/8/2015 signed by Shirley Stinebiser does not satisfy the requirement for notice to her.) <p>~Please see additional page~</p> <p>Reviewed by: LEG</p> <p>Reviewed on: 7/8/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 21 – Barger</p>
	Full IAEA: OK	
Cont. from 060815	Will Dated: 3/25/2015	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC	Residence: Fresno	
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	Publication: Business Journal	
<input type="checkbox"/> Aff.Mail		
<input checked="" type="checkbox"/> Aff.Pub.	Estimated value of the Estate:	
<input type="checkbox"/> Sp.Ntc.	Real property - \$300,000.00	
<input type="checkbox"/> Pers.Serv.	Personal property - \$ 500.00	
<input type="checkbox"/> Conf. Screen	Total - \$300,500.00	
<input checked="" type="checkbox"/> Letters	Probate Referee: Rick Smith	
<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		

NEEDS/PROBLEMS/COMMENTS, continued:

- 4. Item 5(a)(2)(b) states Decedent's spouse is deceased. Item 8 of the *Petition* does not include the name and date of death of Decedent's deceased spouse pursuant to Local Rule 7.1.1(D) which provides that if a beneficiary, heir, child, spouse or registered domestic partner in any action before the Probate Court is deceased, that person's date of death shall be included in the petition.**
- 5. Item 5(a) of the *Petition* is incomplete as to (3) or (4) re: registered domestic partner, and (7) or (8) re: issue of a predeceased child.**

Note: If *Petition* is granted, Court will set Status Hearings as follows:

- Tuesday, December 15, 2015 at 9:00 a.m. in Dept. 303 for the filing of final inventory and appraisal; and**
- Tuesday, September 13, 2016 at 9:00 a.m. in Dept. 303 for the filing of first account and/or petition for final distribution.**

Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.

23 Emmanuel Vasquez, Anabeth Vasquez (GUARD/P) Case No. 15CEPR00631

Petitioner **Dena Sheree Vasquez (Pro Per – Stepmother – Petitioner)**

Petition for Appointment of Temporary Guardian (Prob. Code §2250)

		See petition for details.	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>NOTE: The date of this hearing was erroneously printed by the Court on the Notice of Hearing form as <u>7/16/15</u> rather than <u>7/13/15</u>, which was the date printed on the filed petition. Therefore, it appears parties served with the Notice of Hearing may not be aware that the hearing is scheduled for 7/13/15. The Court may continue the matter to 7/16/15.</p> <p>1. Need proof of service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing or consent and waiver of notice on: - Manuel John Vasquez (Father)</p>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			W
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 7/8/15	
			Updates:	
			Recommendation:	
			File 23 - Vasquez	

Attorney LeVan, Nancy J.

Probate Status Hearing Re: termination of proceeding for deceased conservatee

Age:		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Petition For Termination of Conservatorship filed 7/1/15 is set for hearing on 8/11/15.</p>
DOD:		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 7/7/15
		Updates:
		Recommendation:
		File 24 – Sorensen

Petitioner Jessica Roman (Pro Per Petitioner, mother's first cousin)

Petition for Appointment of Temporary Guardian of the Person

		<u>General Hearing set for 9/1/2015</u>	NEEDS/PROBLEMS/COMMENTS:
		JESSICA ROMAN, mother's first cousin, is Petitioner.	<ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of five (5) court days' notice by personal service of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian</i>, or <i>Consent to Appointment of Guardian and Waiver of Notice</i>, or a <i>Declaration of Due Diligence</i> for: <ul style="list-style-type: none"> • Inez Gonzalez, mother; • Ronnie Padilla, father.
		~Please see <i>Petition for details</i> ~	
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	X	
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	X	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 7/8/15
			Updates:
			Recommendation:
			File 25 - Gonzalez