

Age: 18	KARA M. HODGSON , mother/guardian, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> The accounting is not on the Mandatory Judicial Council Forms as require pursuant to CA Rules of Court 7.575(e)(1). Need Order Settling Third and Final Account and Order for Withdrawal of Funds from Blocked Account.
	All monies are in blocked accounts.	
	Account period: 01/01/07 – 03/23/15	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.	Accounting - \$76,260.43	
<input checked="" type="checkbox"/> Verified	Beginning POH - \$68,560.03	
<input type="checkbox"/> Inventory	Ending POH - \$75,322.93	
<input type="checkbox"/> PTC	Guardian - waived	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Attorney - \$1,250.00 (OK per Local Rule)	
<input checked="" type="checkbox"/> Aff.Mail w/		
<input type="checkbox"/> Aff.Pub.	Costs - \$501.50 (Certified copies, filing fees)	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	Petitioner prays for an Order:	
<input type="checkbox"/> Letters	1. Approving, allowing and settling the Third and Final Account;	
<input type="checkbox"/> Duties/Supp	2. Authorizing the attorney fees and costs; and	
<input type="checkbox"/> Objections	3. Authorizing and directing the Guardian, pursuant to an Order for Withdrawal of Funds from Blocked Account, to deliver the property remaining in her possession to Rowan Hodgson-Cruz.	
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 2620(c)		
<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: JF
		Reviewed on: 07/16/15
		Updates:
		Recommendation:
		File 1 – Hodgson-Cruz

Amended Final Account and Report of Administrator and Petition for Settlement and for Final Distribution and for Payment of Statutory Fees to Personal Representative.

DOD: 5/12/14	DORIS BRADSHAW , Successor Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 061615	This estate was re-opened in order to complete the processing of the claim on behalf of the decedent in the Black Farmers Discrimination Litigation.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory	Account period: 1/28/15 – 5/1/15	
PTC	Accounting - \$62,508.91	
Not.Cred.	Beginning POH - \$0	
<input checked="" type="checkbox"/> Notice of Hrg	Ending POH - \$50,008.91	
<input checked="" type="checkbox"/> Aff.Mail W/	Administrator - \$2,500.36 (statutory)	
Aff.Pub.	Closing - \$1,000.00	
Sp.Ntc.	Petitioner proposes to pay the outstanding creditor claims that were approved but not paid totaling \$2,865.56.	
Pers.Serv.		
Conf. Screen		
<input checked="" type="checkbox"/> Letters 1/28/15	Proposed Distribution, pursuant to intestate succession, is:	
Duties/Supp	Andrew Hatchett - \$6,110.43	
Objections	Deloris Johnson - \$6,110.43	
Video Receipt	Joyce Johnson - \$6,110.43	
CI Report	Clemmie Johnson Jr. - \$6,110.43	
9202	Debra Johnson - \$6,110.43	
<input checked="" type="checkbox"/> Order	Pamela Johnson - \$6,110.43	
Aff. Posting	Patrick Johnson - \$6,110.43	
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 7/16/15
		Updates:
		Recommendation: SUBMITTED
		File 3 - Johnson

Age: 6	ANDREW HILL, father, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need <i>Notice of Hearing</i> . 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> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for: a. Stephanie Morrison (mother) b. Paternal grandparents
	DONAVAN MORRISON and PRISCILLA MORRISON , maternal grandparents, were appointed as Co-Guardians on 07/12/11. – <i>Consent of both guardians filed 05/21/15.</i>	
Cont. from	Mother: STEPHANIE MORRISON	
Aff.Sub.Wit.	Paternal grandparents: NOT LISTED	
✓ Verified	Petitioner states that Jacob has been living with him full time since March 2013. The Guardians are in agreement that the guardianship be terminated.	
Inventory	Court Investigator Jennifer Young filed a report on 07/14/15.	
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
✓ CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 07/16/15
		Updates:
		Recommendation:
		File 4 – Morrison

5 Chessa Chapman & John Paul Chapman (GUARD/P) Case No. 12CEPR00886

Petitioner Chapman, Tammy Renia (pro per – mother)

Petition for Termination of Guardianship

Chessa, 16	TAMMY CHAPMAN, mother, is Petitioner.		NEEDS/PROBLEMS/COMMENTS:
John Paul, 13	JUANITA QUINN, paternal grandmother, was appointed guardian of the minors on 12/04/12. – Personally served on 06/01/15		
Cont. from	Father: JOHN CHAPMAN – Personally served on 06/09/15		
<input type="checkbox"/> Aff.Sub.Wit.	Paternal grandfather: DECEASED		
<input checked="" type="checkbox"/> Verified	Maternal grandfather: PAUL SMITH – personally served on 06/04/15		
<input type="checkbox"/> Inventory	Maternal grandmother: DECEASED		
<input type="checkbox"/> PTC	Petitioner states that she is able to take care of the minors. The guardian is always sick and has not had the children in her care for at least a year.		
<input type="checkbox"/> Not.Cred.	Court Investigator Julie Negrete filed a report on 07/15/15.		
<input checked="" type="checkbox"/> Notice of Hrg			
<input type="checkbox"/> Aff.Mail			
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input checked="" type="checkbox"/> Pers.Serv.	w/		
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input checked="" type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed by: JF
			Reviewed on: 07/16/15
			Updates:
			Recommendation:
			File 5 - Chapman

Petitioner Molina, Rosa H. (Pro Per Petitioner, paternal grandmother)

Petition to Appoint Guardian of the Person

David Age: 9 yrs DOB: 5/2/2006	TEMPORARY EXPIRES 6/16/2015; extended to 7/21/2015	NEEDS/PROBLEMS/COMMENTS: Continued from 6/16/2015. Minute Order states examiner notes provided in open court. The Court grants one last extension of the Letters; the defects need to be cured. (Note: All defects have been addressed.)
Isaiah Age: 7 yrs DOB: 7/18/2007		
	ROSA H. MOLINA, paternal grandmother, is Petitioner.	
Cont. from 061615	~Please see additional page~	
Aff.Sub.Wit.		
✓ Verified		
Inventory	Court Investigator's Report was filed on 6/9/2015.	
PTC		
Not.Cred.	DSS Social Worker's Report was filed 6/12/2015.	
✓ 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: LEG
		Reviewed on: 7/16/15
		Updates:
		Recommendation:
		File 6 - Corrales

DOD: 5/12/13	<p>ROSANNA TOROSIAN was appointed Administrator with Limited IAEA on 8-6-13. Letters issued 8-30-13.</p> <p>At the hearing on 8-6-13, the Court set this status hearing for the filing of the first account or petition for final distribution.</p> <p>Status Report filed 10/01/14 states: The beneficiaries of the estate are all non-residents of the United States and are represented by Stefano Abbasciano, Esq. of Walnut Creek, CA. The Administrator filed a Creditor's Claim with the Court on or about 11/26/13. An Objection to her creditor's claim was filed 02/19/14 by the heirs represented by attorney Abbasciano. A Mutual Compromise and Settlement Agreement has been agreed upon between Ms. Torosian and the heirs of the estate. Said settlement agreement is now being circulated for signature among Ms. Torosian and the heirs. All other matters of probate have been resolved and it is anticipated that once the settlement agreement is approved a First and Final Account and Report of the Estate can be filed, a hearing set and the Estate distributed. A 90 day continuance is requested.</p> <p>Status Report filed 12/11/14 states: The Settlement Agreement had to be circulated among heirs in Italy and has taken substantial time to complete, but has now been executed by all parties and provided to Attorney Bagdasarian for incorporating into the final report. An additional 60 days is requested.</p> <p>On 2/10/15, a Corrected Final I&A and Notice of Proposed Action were filed; however, no current status report has been filed.</p> <p>Status Report filed 6/22/15 states the Administrator has now just completed the sale of all savings bonds through the US Treasury. Mr. Bagdasarian requests 30 days.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR</u></p> <p>First and Final Account filed 7/17/15 is set for hearing on 8/27/15.</p>
Cont from 100314, 121714, 042115, 062315		
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: skc</p> <p>Reviewed on: 7/16/15</p> <p>Updates: 7/17/15</p> <p>Recommendation:</p> <p>File 7 - Otrakjian</p>	

Probate Status Hearing Re: Filing of First Account and Petition for Final Distribution

DOD: 9/28/11	<p>ESTELLA GARZA GARZA, RAQUEL GARZA NANEZ, and ROJELIA GARZA GONZALEZ were appointed as Co-Executors on 5/27/14 with Limited IAEA without bond. Letters issued 10/3/14.</p> <p>At the hearing on 5/27/14, the Court set this status hearing for the filing of the first account or petition for final distribution.</p> <p>Note re history: The following events have occurred in this estate:</p> <p>I&A Partial No. 1 filed 9/5/14 includes various real property with a total value of \$250,000.00. <i>Note: This I&A is defective. #5 (Property Tax Certificate) is checked "not applicable," however, that is not the case, because this I&A consists of real property.</i></p> <p>No Final I&A has been filed.</p> <p>On 1/28/15, the Court confirmed the sale of one of the properties and ordered the proceeds placed into a blocked account. Receipt was filed 3/3/15.</p> <p>On 6/19/15, the Co-Executors filed an Ex Parte Petition for Withdrawal of Funds from Blocked Account that requested distribution of the funds in the blocked account to the beneficiaries. The petition was denied, as no order for distribution has been entered.</p> <p>On 7/8/15, the Co-Executors filed a Petition for Preliminary Distribution that is set for hearing on 8/13/15.</p> <p>Status Report filed 7/16/15 (with notice of hearing to all heirs) states the estate is not in a condition to be closed at this time. Responses from the Franchise Tax Board and the Victim's Compensation and Government Claims Board are pending. The Final Inventory and Appraisal should be completed within 30 days. The Co-Executors have filed a Petition for Preliminary Distribution that is set for hearing on 8/13/15. An additional 60-90 days is requested to continue administration and to file a final account and petition for final distribution.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Final Inventory and Appraisal. Probate Code §8800. 2. Need first account or petition for final distribution. <p>Note: Petition For Preliminary Distribution filed 7/8/15 is set for hearing on 8/13/15.</p>
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: skc</p> <p>Reviewed on: 7/16/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 8 - Garza</p>	

9 2013 Walter Edward Eastwood Revocable Trust Case No. 14CEPR00069

**Attorney LeVan, Nancy J. (for Susan Brown – Trustee – Petitioner)
 First and Final Account of Trustee; Petition for Allowance of Fees for her Attorney;
 Reimbursement to Trustee for Out of Pocket Expenses Petition; Reimbursement of Labor and
 Materials and for Distribution and Termination of the Trust**

DOD: 3/21/14	SUSAN BROWN , Trustee with bond of \$74,000.00, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Amended Petition filed 7/16/15 is set for hearing on 8/26/15.</p> <p>Note: This trust was created via substituted judgment in Conservatorship case 12CEPR00922 on 8/20/13.</p> <ol style="list-style-type: none"> 1. Need itemization of \$722.22 reimbursement requested to Petitioner. 2. Need itemization for attorney fee request of \$1,500.00. 3. Need itemization of \$3,488.98 reimbursement requested to the Kerbys (buyers of the home). (Disbursements schedule reflects various payments to the Kerbys.) 4. Need clarification re disbursements of \$3,600 and \$2,000 to Petitioner for repay loans to estate. 5. Many of the disbursements for the house appear to be a family or affiliate relationship to petitioner; however, the petition does not disclose any relationships pursuant to Probate Code §1064(a)(4). Need clarification.
Cont. from 061615	Account period: 8/23/13 – 4/4/15 Accounting: \$236,090.27 Beginning POH: \$205,417.82 Ending POH: \$111,831.88 (cash)	
<input type="checkbox"/> Aff.Sub.Wit.	Trustee: \$772.22 (reimbursement for payments made for the trust, filing fees, other expenses)	
<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	Trustee states the decedent's home was sold to the Kerbys, who purchased materials and provided labor to bring the home up to code into a condition where it could be sold. In addition to what the trust has paid them up to this point, the trustee requests authorization to pay the Kirbys an additional \$3,488.98.	
<input checked="" type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp	Attorney: \$1,500.00	
<input type="checkbox"/> Objections	Petitioner requests distribution to the named five beneficiaries in the amount of \$21,214.13 each and termination of the trust.	
<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: 7/16/15
		Updates: 7/17/15
		Recommendation:
		File 9 - Eastwood

DOD: 01/25/14	On 04/02/15, PUBLIC ADMINISTRATOR , Administrator, filed its First and Final Account and Report of Administrator and Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and for Distribution.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	The Petition proposed to distribute a share to Albert Hall, however, Mr. Hall had filed an Assignment of Interest on 07/16/14 assigning his share of the estate to Gwen Allen.	
Aff.Sub.Wit.		
Verified	Minute Order from hearing on 05/26/15 set this matter for status regarding additional distribution.	
Inventory		
PTC	Order for Preliminary Distribution After Hearing on First and Final Account filed 06/11/15 approved distribution of the estate to the beneficiaries except as to Albert Hall's share.	
Not.Cred.		
Notice of Hrg	Declaration of Assignment filed 07/07/15 by Gwen Allen, acknowledges that Albert Hall assigned his portion of the estate to her on 07/16/14 and reassigns that share back to Albert Hall.	
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: 07/16/15
		Updates:
		Recommendation:
		File 10 – Hall

Attorney Gin, Robert W. (for Petitioners Catalina (aka Katie) Perry and Stella Lopez)

Petition for Final Distribution on Waiver of Accounting, and for Allowance of Statutory Compensation to Co-Administrators and Attorneys and Request for Extraordinary Attorneys' Fees

DOD: 12/12/2013	CATALINA (aka KATIE) PERRY and STELLA LOPEZ, Co-Administrators, are Petitioners.		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note Re Informal Accounting of Closing Reserve: If <i>Petition</i> is granted, pursuant to Local Rule 7.12.6, Court will set a Status Hearing as follows:</p> <ul style="list-style-type: none"> Thursday, January 21, 2016 at 9:00 a.m. in Dept. 303 for an Informal Accounting of the \$5,000.00 Closing Reserve. <p>Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the date listed, the hearing will be taken off calendar and no appearance will be required. Filing of the informal accounting of closing reserve will not generate a new hearing date.</p>
	Accounting is waived.		
Cont. from	I & A	— \$388,427.50	
Aff.Sub.Wit.	POH	— \$171,083.70 <i>(all cash)</i>	
✓ Verified			
✓ Inventory	Co-Administrators	— \$10,768.55 <i>(statutory; to be divided in equal shares;)</i>	
✓ PTC			
✓ Not.Cred.	Attorney	— \$10,768.55 <i>(statutory)</i>	
✓ Notice of Hrg	Attorney X/O	— \$1,697.70 <i>(per Declaration and itemization at Exhibit C; for clearing title to real property in Decedent's name; halt of foreclosure and negotiations with lender; sale of real property, including cancellation of first sale and completion of subsequent sale; communications for distribution of 401(k) to estate;)</i>	
✓ Aff.Mail	W	/	
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters	050514, amended 072514	Attorney Costs — \$212.28 <i>(balance due of total \$582.28 for costs (\$370.00 was paid) for recording fees, publication, certified copies;)</i>	
Duties/Supp			
Objections			
Video Receipt		Closing — \$5,000.00 <i>(for estimated closing, certification and recording fees;)</i>	
CI Report			
✓ 9202			
✓ Order		~Please see additional page~	
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
✓ FTB Notice			
			<p>Reviewed by: LEG</p> <p>Reviewed on: 7/17/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11 - Maldonado</p>

Additional Page 11, David John Maldonado (Estate) Case No. 14CEPR00274

Petitioners state:

- A Creditor's Claim filed on 10/14/2014 for **\$675.00** by Trinity Home Health Care was not served to the Co-Administrators nor the Attorney with a copy of the claim, which does not comply with Probate Code § 9150; the Creditor's Claim is invalid and time-barred; Petitioners request that they be permitted to close the estate without payment on the untimely and invalid claim;
- Petitioners made partial distributions to the following because of severe financial hardship faced by the heirs due to loss of work as a result of the drought; these sums should be charged against the distributions they will receive from the estate, as follows:
 - Total of **\$1,900.00** to Petitioner Katie Perry (see itemization, for personal bills automobile costs, and Christmas expenses);
 - Total of **\$689.93** (see itemization, for personal expenses, bills, groceries, Christmas expenses) to Petitioner Stella Lopez;
 - Total of **\$100.00** to heir Rosa Maldonado (for groceries).

Distribution pursuant to intestate succession is to:

- **CATALINA (aka KATIE) PERRY – \$16,265.81 cash;**
- **STELLA LOPEZ – \$17,475.89 cash;**
- **ROSA MALDONADO – \$18,065.82 cash;**
- **RUBEN MALDONADO, JR. – \$18,165.82 cash;**
- **ROBERT MALDONADO – \$18,165.82 cash;**
- **RACHEL SARRATT – \$18,165.82 cash;**
- **DANIEL MALDONADO – \$18,165.82 cash;**
- **REBECCA HARLESS – \$18,165.82 cash.**

First and Final Account and Report of Conservator and Her Attorney; and Distribution

DOD: 12/19/14	PUBLIC GUARDIAN , conservator of the estate, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> The Conservatorship was initiated by Maria Begoinia Brownson using a fee waiver. Government Code §68631 states in relevant part that "At the end of the case, the court may recover fees and costs that were initially waived under circumstances set forth in Section 68637." Therefore it appears that the filing fees waived can now be recovered. The filing fees total \$495.00 (\$60.00 for the temporary petition and \$435.00 for the general petition). Inventory and Appraisal filed on 11/13/14 indicates it is a partial inventory. Need final inventory.
	Account Period: 5/9/14 – 12/19/14	
	Accounting - \$427,524.00	
Cont. from	Beginning POH - \$421,000.00	
Aff.Sub.Wit.	Ending POH - \$421,321.88	
<input checked="" type="checkbox"/> Verified	Subsequent Account Period: 12/20/14 – 5/13/15	
Inventory	Accounting - \$421,321.90	
PTC	Beginning POH - \$421,321.88	
Not.Cred.	Ending POH - \$421,321.90 (\$321.90 is cash)	
<input checked="" type="checkbox"/> Notice of Hrg	Conservator - \$1,606.32 (13.70 Deputy hours @ \$96/hr and 5.40 Staff hours @ \$76/hr)	
<input checked="" type="checkbox"/> Aff.Mail w/	Attorney - \$2,000.00 (per Local Rule)	
Aff.Pub.	Bond Fee - \$25.00 (o.k.)	
Sp.Ntc.	Court Fees - \$539.00 (filing fee, certified copies)	
Pers.Serv.	Petitioner request that due to the insufficiency of the estate to pay the fees and commissions that a lien be imposed upon the estate for any unpaid balances of the authorized fees and commissions.	
Conf. Screen	Petitioner prays for an Order:	
Letters	1. Approving, allowing and settling the first and final account;	
Duties/Supp	2. Authorizing the conservator and attorney fees and commissions;	
Objections	3. Payment of the bond fee and court fees;	
Video Receipt	4. Authorize petitioner to impose a lien on the estate for any unpaid balances of authorized fees and commissions;	
CI Report	5. Distribution of the real property to the Public Administrator as Administrator of the Estate of Olivia M. Garcia.	
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Reviewed by: KT
Reviewed on: 7/16/15
Updates:
Recommendation:
File 12 - Garcia

Attorney Howk, Robert L. (for Administrator Ellen Ellerbrock)

Probate Status Hearing RE: Filing of Inventory and Appraisal

DOD: 6/13/2012		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;">OFF CALENDAR</p> <p><i>Final Inventory and Appraisal filed 3/18/2015.</i></p>
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input checked="" type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input type="checkbox"/>	Pers.Serv.	
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: LEG
		Reviewed on: 7/17/15
		Updates:
		Recommendation:
		File 13A - Abston

Attorney Howk, Robert L. (for Administrator Ellen Ellerbrock)

Probate Status Hearing Re: First Account

DOD: 6/13/2012		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;">OFF CALENDAR</p> <p><i>First and Final Account filed 7/10/2015 is set for hearing on 8/18/2015.</i></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		
		Reviewed by: LEG
		Reviewed on: 7/17/15
		Updates:
		Recommendation:
		File 13B - Abston

Attorney Brown, Eric R., of Carmichael (for Petitioner Lee X. Yang, Administrator)

1) First and Final Report of Administrator on Waiver of Account and Petition for Settlement Thereof; (2) for Allowance of Agreed Attorney's Compensation; (3) for Reimbursement of Costs Advanced; and for (4) Final Distribution

DOD: 1/16/2014	LEE X. YANG , nephew and Administrator, is Petitioner.		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED TO 9/1/2015 Per Attorney request</p> <p>The following issues from the last hearing remain:</p> <ol style="list-style-type: none"> 1. <i>Final Inventory and Appraisal</i> filed on 11/12/2014 is incomplete at Item 5 re: property tax certificate, as required by Probate Code § 8800(d). Need statement regarding Property Tax Certificate. (Revenue and Tax Code § 480.) 2. <i>Petition</i> does not contain a statement regarding whether notice has been sent to the Franchise Tax Board as required pursuant to Probate Code 9202(c)(1) for estates in which <i>Letters</i> were issued 7/1/2008 or after, and Court records contain no proof of service of such notice. Need proof of service of notice to the Franchise Tax Board pursuant to Probate Code 9202(c)(1).
	Accounting is waived.		
Cont. from 042315	I & A	— \$319,500.00	
<input type="checkbox"/> Aff.Sub.Wit.	POH	— \$319,500.00 (no cash)	
<input checked="" type="checkbox"/> Verified			
<input checked="" type="checkbox"/> Inventory	Administrator	— waives	
<input type="checkbox"/> PTC		X	
<input checked="" type="checkbox"/> Not.Cred.	Attorney	— \$5,000.00 (less than \$9,390.00 statutory; to be paid outside probate;)	
<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	072314		
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input checked="" type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice		X	
			<p>Reviewed by: LEG</p> <p>Reviewed on: 7/17/15</p> <p>Updates: 7/20/15</p> <p>Recommendation:</p> <p>File 14 - Lee</p>

Probate Status Hearing RE: Receipt for Blocked Account

	<p>MARIA GUADALUPE VALENCIA, Mother, is Guardian of the Estate.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Receipt filed 7/1/15.</p>
Cont. from 060915		
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: skc</p>	
	<p>Reviewed on: 7/16/15</p>	
	<p>Updates:</p>	
	<p>Recommendation:</p>	
	<p>File 15 – Patino</p>	

16 Alveon LaJuan Moultrie (GUARD/E) Case No. 14CEPR00956

Guardian Moultrie, Alvin (Pro Per – Father – Guardian of the Estate)

Probate Status Hearing Status RE: Filing of the Inventory and Appraisal.

	<p>ALVIN MOULTRIE, Father, was appointed Guardian of the Estate without bond on 3/24/15.</p> <p>At the hearing on 3/24/15, the Court set this status hearing for the filing of the Inventory and Appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: The status hearings re receipt for blocked accounts in both minors' estates was continued to 7/29/15.</p> <p>1. Need Inventory and Appraisal per Probate Code §2610 or written status report per Local Rule 7.5.</p>
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: 7/17/15
		Updates:
		Recommendation:
		File 16 – Moultrie

	ALVIN MOULTRIE, Father, was appointed Guardian of the Estate without bond on 3/24/15.	NEEDS/PROBLEMS/COMMENTS: Note: The status hearings re receipt for blocked accounts in both minors' estates was continued to 7/29/15. 2. Need Inventory and Appraisal per Probate Code §2610 or written status report per Local Rule 7.5.
	At the hearing on 3/24/15, the Court set this status hearing for the filing of the Inventory and Appraisal.	
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: 7/17/15
		Updates:
		Recommendation:
		File 17 - Moultrie

Guardian: Timothy Nieto Gutierrez (pro per)

Probate Status Hearing Re: Suspended License

	TIMOTHY NIETO GUTIERREZ , step-father, was appointed guardian on 2/24/15.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 5/26/15. Minute order states Mr. Gutierrez provides proof of enrollment and attendance at the Mulit-Offender DUI Program as of 2/27/15; he anticipates receiving a restricted license in the next week. Mr. Gutierrez is to bring additional proof of attendance at said classes and proof of the status of his license on 7/21/15.</p>
	Minute order dated 2/24/15 states Mr. Gutierrez is ordered to bring paperwork regarding his classes to the status hearing on 5/26/15.	
Cont. from 052615		
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: KT
		Reviewed on: 7/16/15
		Updates:
		Recommendation:
		File 18 - McCloud

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

DOD: 2/14/07		<p>ISAAC L. CANDLER, son, is Petitioner.</p> <p>40 days since DOD</p> <p>No other proceedings</p> <p>I&A (Previously filed): \$150,000.00 (real property located at 2345 South Lily, Fresno, 93706)</p> <p>Decedent died intestate</p> <p>Petitioner states he was provided care for the decedent while living at the decedent's residence and is claiming a 100% interest in the estate.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Petitioner's original petition was filed by Petitioner alone, and it was noted for the hearing on 3/17/15 that Petitioner had siblings; therefore, they are all heirs and would need to petition the court together.</p> <p>The Amended petition filed 3/23/15 was filed by all three of the heirs together, each claiming a 1/3 interest, however, Examiner Notes for the hearing on 6/16/15 listed various issues including:</p> <ul style="list-style-type: none"> - Need date of death of the decedent's deceased spouse. If post-deceased, the spouse's estate may also be an heir. - Need Attachment 11 containing legal description and statement of the decedent's interest in the real property. - Need clarification as to whether personal property is included. <p>This Second Amended petition reverts back to Petitioner, alone, claiming a 100% interest in the real property.</p> <p>In this type of summary proceeding, the Court can only confirm distribution to the proper heirs, which in this case, would be Petitioner and his siblings, or might possibly include the estate of the decedent's spouse, if post-deceased.</p> <p>Therefore, need further amended petition. Petitioner may wish to seek legal advice going forward.</p> <p>2. If this petition goes forward, need notice, and information previously requested as noted above.</p>	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input 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 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			
<p>Reviewed by: skc</p> <p>Reviewed on: 7/16/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 19A - Candler</p>				

DOD: 12/7/13		JEFF S. SHEPARD , Nominee, is Petitioner and requests appointment as Administrator with Full IAEA with bond of \$300,000.00.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 061615		Petitioner is nominated by Mark Rodriguez, son.	<p><u>OFF CALENDAR</u></p> <p>Order Authorizing withdrawal of petition filed 7/17/15.</p>
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Full IAEA – ok	
<input type="checkbox"/>	Inventory	Decedent died intestate	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.	Residence: Fresno	
<input checked="" type="checkbox"/>	Notice of Hrg	Publication: Business Journal	
<input checked="" type="checkbox"/>	Aff.Mail	Estimated value of estate: Personal property: \$300,000.00	
<input checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.	Probate Referee: Rick Smith	
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters	x	
<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 type="checkbox"/>	Order	x	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: skc
			Reviewed on: 7/16/15
			Updates: 7/17/15
			Recommendation:
			File 20 - Rodriguez

21 Isaiah Mobley, Tristen Olivarez, and Ashton Olivarez (GUARD/P)

Case No. 15CEPR00532

Attorney Ma, Stanley S. (for Richard Olivarez and Rosemary Olivarez – Petitioners - Paternal Grandparents)
 Objector Esparza, Theresa (Pro Per – Maternal Grandmother)

Petition for Appointment of Guardianship of the Person

Isaiah, 10	<p><u>TEMPORARY EXPIRES 07/21/15</u></p> <p>RICHARD OLIVAREZ and ROSEMARY OLIVAREZ, paternal grandparents of Tristen and Ashton, are Petitioners)</p> <p><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Theresa Esparza, maternal Grandmother, filed a competing petition on 07/17/2015. The hearing is set for 09/16/2015.</p> <p>1. Separate proofs of service were filed showing service on the following individuals:</p> <ul style="list-style-type: none"> • Ronnie Mobley • Francine Esparza • Isaac Esparza • Terry Esparza • Larissa Esparza • Micole Esparza <p>Although the proofs of service state that the notice of hearing was served on each of the individuals it is unclear what notice of hearing was actually served as it was not attached to the proofs of service. Notice of Hearing provides the date, time and department of the hearing and it is therefore unclear to the court if proper notice was given without the mandatory judicial council form attached to the proofs of service.</p> <p>2. Need proof of personal 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:</p> <ul style="list-style-type: none"> • Ronald Mobley <p>Note: Proof of service filed 07/17/2015 shows a Ronnie Mobley was personally served on 07/01/2015. It is unclear if this is the father or another individual.</p> <p><u>Please see additional page</u></p>
Tristen, 8		
Ashton, 4		
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv.		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<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		
<p>Reviewed by: LV</p>		
<p>Reviewed on: 07/17/2018</p>		
<p>Updates:</p>		
<p>Recommendation:</p>		
<p>File 21 – Mobley & Olivarez</p>		

Needs/Problems / Comments (continued):

3. 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:

- Isache Esparza (Maternal Grandfather)

Note: A proof of service was filed on 07/16/2015 showing service on an Isaac Esparza, it is unclear if this is the maternal grandfather or another individual.

- Paternal Grandfather (Unknown) – Unless the Court dispenses with notice.

Note: Declaration of Due Diligence filed 07/16/2015 states the name of the paternal father is unknown. Petitioner has never had contact with this individual.

- JoAnn Mobley (Paternal Grandmother) – Unless the Court dispenses with notice.

Note: Declaration of Due Diligence filed 07/16/2015 states petitioner was not able to locate Ms. Mobley. Petitioner has never had contact with this individual.

4. UCCJEA is incomplete. Need minor's residence information for the past 5 years.

Petitioner Yvonne Cruz (Pro Per – Paternal Grandmother – Petitioner)

Attorney Bakergumprecht-Davies, Kathleen (for Destiny N. Cleland – Mother)

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

See petition and objection for details.			NEEDS/PROBLEMS/ COMMENTS:
Cont. from 062415			<p><u>Note:</u> The Court's order of 6/24/15 provides for unsupervised visits to the mother from 10am Sunday to 4pm Monday starting 6/28/15. See order for restrictions.</p> <p><u>Update:</u> Mother's objection was filed 6/24/15. Petitioner's reply was filed 7/7/15.</p>
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	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: skc
			Reviewed on: 7/17/15
			Updates:
			Recommendation:
			File 27 - Villa

Petition for Probate of Will and for Letters Testamentary with IAEA

DOD: 8/14/14		<p>BEVERLY J. LEACH, spouse/named executor without bond, is petitioner.</p> <p>Full IAEA - ??</p> <p>Will dated 12/13/05.</p> <p>Residence: Fresno</p> <p>Publication: NEED</p> <p>Estimated value of the estate: Personal property \$260,000.00 Annual income \$ 10,000.00 Total \$270,000.00</p> <p>Probate Referee: Rick Smith</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> #8 of the Petition does not list the Trustee of the Leach Family Trust. Need Notice of Petition to Administer the Estate. Need proof of service of the Notice of Petition to Administer the Estate on all parties entitled to notice. Need Duties and Liabilities. Need Supplement to the Duties and Liabilities. Need Affidavit of Publication. Need Order Need Letters <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Wednesday, December 16, 2015 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Wednesday, September 14, 2016 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.	S/P		
<input checked="" type="checkbox"/> Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail	X		
Aff.Pub.	X		
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters	X		
Duties/Supp	X		
Objections			
Video Receipt			
CI Report			
9202			
Order	X		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: KT			
Reviewed on: 7/16/15			
Updates:			
Recommendation:			
File 23 – Leach			

Petition to Determine Succession to Real Property

DOD: 7/19/14		<p>KATHRYNE A. KASPERIAN, Successor Trustee of the Haig and Kathryn Kasparian Living Trust, is petitioner.</p> <p>40 days since DOD.</p> <p>No other proceedings.</p> <p>Will dated: 9/17/08 – Devises the residue of the estate to the Haig and Kathryn Kasparian Living Trust.</p> <p>I & A - \$91,250.00</p> <p>Petitioner requests Court determination that Decedent's 50% interest in real property located in Clovis passes to her as Trustee of the Haig and Kathryn Kasparian Living Trust.</p>	NEEDS/PROBLEMS/COMMENTS:				
Cont. from							
<input type="checkbox"/>	Aff.Sub.Wit.						
<input checked="" type="checkbox"/>	Verified						
<input type="checkbox"/>	Inventory						
<input type="checkbox"/>	PTC						
<input type="checkbox"/>	Not.Cred.						
<input checked="" type="checkbox"/>	Notice of Hrg						
<input checked="" type="checkbox"/>	Aff.Mail W/O						
<input type="checkbox"/>	Aff.Pub.						
<input type="checkbox"/>	Sp.Ntc.						
<input 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						
		<table border="1"> <tr> <td>Reviewed by: KT</td> </tr> <tr> <td>Reviewed on: 7/17/15</td> </tr> <tr> <td>Updates:</td> </tr> <tr> <td>Recommendation: SUBMITTED</td> </tr> <tr> <td>File 24 - Kasparian</td> </tr> </table>	Reviewed by: KT	Reviewed on: 7/17/15	Updates:	Recommendation: SUBMITTED	File 24 - Kasparian
Reviewed by: KT							
Reviewed on: 7/17/15							
Updates:							
Recommendation: SUBMITTED							
File 24 - Kasparian							

1 **John Tutelian Trusts 8-21-1998 (Trust) Case No. 11CEPR01060**
Attorney Jaech, Jeffrey A. (for Michelle Tutelian – successor trustee/Petitioner)
Second Account and Report of Trustees and Petition for Its Settlement

	MICHELLE TUTELIAN , successor trustee, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS: This matter will be heard in Dept. 72 at 8:30am.
	John and Sonia Tutelian, Settlor, created the John and Sonia Tutelian Trust, dated 3/24/93. The Settlor amended the Trust by First Amendment dated 8/21/98.	
Cont. from 070715		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Upon Settlor John's death on 3/18/03 (and pursuant to the Trust), the Trust estate was divided into 3 separate trusts – the Survivor's Trust, the Marital Trust, and the Residual Trust.	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	This accounting and report, which covers 01/01/11 – 12/31/14, relates only to John's share of the Trust estate, which became the Marital and Residual Trusts, which are irrevocable.	
<input checked="" type="checkbox"/> Aff.Mail	w/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Net Income payable to Sonia Tutelian: Marital Trust - \$130,026.83 Residual Trust - \$104,259.55	
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters	The Marital Trust and Residual Trust each hold 50% of the shares of S Corporation, Civic Center Square, Inc.	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt	During the accounting period, a promissory note held by the Marital Trust was renegotiated resulting in the Residual Trust paying \$500,000.00 of principal to the Marital Trust. Sonia Tutelian is the income beneficiary of both the Residual and Marital Trust, interest paid on the note would increase Sonia's net income from the Marital Trust and decrease her net income from the Residual Trust in an equal amount. For convenience, no interest was actually paid, because payment would have no effect on any beneficiary.	
<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	The Residual Trust owns a judgment against Pacific States Leasing, a now defunct business. During the accounting period, the trustees collected a net of \$23,456.88. Petitioner believes that further expenditures to try to collect the judgment would not be worthwhile and so has ceased pursuing collection. Continued from Page 2	

Reviewed by: JF
Reviewed on: 07/17/15
Updates:
Recommendation:
File 1 - Tutelian

No Trustees' Fees were paid during the accounting period.

The following attorneys' fees were paid during the accounting period:

Baker, Manock & Jensen	-	\$18,634.40
Betts & Rubin	-	\$23,181.00
Betts, Rubin & McGuiness	-	\$3,931.50

Petitioner requests this Court to order that:

1. The second account and report of the trustees be settled, allowed, and approved as filed; and
2. All the acts and proceedings of the trustees during the accounting period be confirmed and approved.