



## ATTENTION

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

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

Thank you for your patience.

**(1) First Account and Report of Conservator, (2) Petition for Allowance of Fees for Attorney and (3) Petition for Waiver of Further Accounting (Prob. C. 2620, 2623, 2640, 2942)**

<b>DOD: 05/05/09</b>	<b>PAT MIRANDA</b> , Conservator, is Petitioner.		<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>CONTINUED FROM 06/18/12</b> As of 07/17/12, no additional documents have been filed and following items remain:  1. Need Order. 2. Previous status reports filed in this matter indicate that the conservatee died on 05/05/09, this account only covers the period from 08/21/03 – 07/18/06. Need accounting for period of 07/19/06 – 05/05/09. 3. Distributions reflect monthly payment to Conservator, Pat Miranda, of \$400.00 for <u>room and board</u> ; however, there are multiple distributions to grocery stores as follows: - 10/11/03 Food Maxx - \$186.09 - 10/28/03 Savemart - \$36.70 - 11/08/03 Savemart - \$89.47 - 01/05/03 Savemart - \$65.30 - 02/02/04 RN Market - \$70.31 - 05/12/04 Food 4 Less - \$87.06 - 06/24/04 Savemart - \$87.65 - 07/12/04 Savemart - \$86.83 - 08/02/04 RN Market - \$43.37 - 08/05/04 Food Maxx - \$88.14 - 09/16/04 Vons - \$59.64 - 01/12/05 RN Market \$58.40 Court may require clarification of charges at grocery stores, were these groceries purchased for the Conservatee? Was food not included in the <u>Room &amp; Board</u> charge? Also there are payments to PG&E as follows: - 01/15/04 \$200.00; 03/04/04 \$167.01; 08/20/04 \$150.00; 09/20/04 \$100.00; 12/17/05 \$150.00; 01/07/05 \$100.00; 02/08/05 \$150.00; 03/08/05 \$150.00; 04/05/05 \$100.00; 05/06/05 \$100.00; 07/11/05 \$155.45; 10/06/05 \$100.00. Was PG&E not included in the room & board payment, if not, why aren't payments made each month. The court may require more information.  Continued on Next Page
	Account period: <b>08/21/03 – 07/18/06</b>		
	Accounting	- \$51,525.40	
	Beginning POH	- \$22,168.18	
	Ending POH	- \$381.16	
<b>Cont. from 032712, 050712, 061812</b>	Conservator	- waives	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Attorney	- \$2,000.00	
<input checked="" type="checkbox"/> <b>Verified</b>	(ok per Local Rule)		
<input type="checkbox"/> <b>Inventory</b>	Petitioner states that there are no assets remaining in the estate and requests that the Conservatorship be terminated.		
<input type="checkbox"/> <b>PTC</b>	<b>Petitioner requests an Order:</b>		
<input type="checkbox"/> <b>Not.Cred.</b>	1. Approving, allowing, and settling the first account; and		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	2. Authorizing payment of attorney's fees;		
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	w/		
<input type="checkbox"/> <b>Aff.Pub.</b>			
<input type="checkbox"/> <b>Sp.Ntc.</b>			
<input type="checkbox"/> <b>Pers.Serv.</b>			
<input type="checkbox"/> <b>Conf. Screen</b>			
<input type="checkbox"/> <b>Letters</b>			
<input type="checkbox"/> <b>Duties/Supp</b>			
<input type="checkbox"/> <b>Objections</b>			
<input type="checkbox"/> <b>Video Receipt</b>			
<input type="checkbox"/> <b>CI Report</b>			
<input type="checkbox"/> <b>9202</b>			
<input type="checkbox"/> <b>Order</b>	x		
<input type="checkbox"/> <b>Aff. Posting</b>			
<input type="checkbox"/> <b>Status Rpt</b>			
<input type="checkbox"/> <b>UCCJEA</b>			
<input type="checkbox"/> <b>Citation</b>			
<input type="checkbox"/> <b>FTB Notice</b>			
<b>Reviewed by:</b> JF			
<b>Reviewed on:</b> 07/17/12			
<b>Updates:</b>			
<b>Recommendation:</b>			
File 1 - McCaslin			

4. Distributions schedule has several additional items that are unexplained and/or require more information showing how they benefited the conservatee, those items are as follows:

- 09/23/03 – Walgreens \$116.10
- 10/11/03 – Simonian Farms \$14.08
- 11/03/03 – SBC \$113.27
- 11/03/03 – Target \$119.80
- 11/03/03 – Sears \$87.31
- 11/03/03 – Sears \$21.58
- 11/13/03 – Walmart \$82.90
- 12/22/03 – Target/Gift Cert. for x-mas \$167.30 – See CRC 7.1059 (b)(3)
- 02/09/04 – Transfer to Acct. XXXXXX-8485 \$400.00 – Is this another account of the conservatee?
- 04/17/04 – Walgreens \$72.36
- 04/20/04 - Transfer to Acct. XXXXXX-8485 \$1,700.00 - Is this another account of the conservatee?
- 04/26/04 – Sears \$228.31
- 05/13/04 - Transfer to Acct. XXXXXX-8485 \$200.00 - Is this another account of the conservatee?
- 05/22/04 – Down payment on El Camino \$1,000.00 – Did the Conservatee drive? Was this car for the conservatee?
- 06/03/04 – Carol Howard \$35.00
- 06/05/04 – Walmart \$246.24
- 07/16/04 – Chapel of the Light \$450.00
- 08/03/04 - Transfer to Acct. XXXXXX-8485 \$400.00 - Is this another account of the conservatee?
- 09/01/04 – Savings Overdraft Fee \$10.00 – see CRC 7.1059(b)(1)
- 10/10/04 – Walmart \$99.92
- 10/21/04 – Wells Fargo Financial - \$70.00
- 10/27/04 – Savings overdraft fee - \$10.00 - see CRC 7.1059(b)(1)
- 11/02/04 – Savings overdraft fee - \$10.00 - see CRC 7.1059(b)(1)
- 11/08/04 – Walter Clarke & Assoc. \$150.00
- 11/08/04 - Transfer to Acct. XXXXXX-8485 \$400.00 - Is this another account of the conservatee?
- 12/02/04 - Savings overdraft fee - \$10.00 - see CRC 7.1059(b)(1)
- 12/15/04 – Transfer to Acct. XXXXXX-8485 \$1,200.00 - Is this another account of the conservatee?
- 01/03/05 - Transfer to Acct. XXXXXX-8485 \$500.00 - Is this another account of the conservatee?
- 01/12/05 – Walmart \$43.33
- 01/14/05 – Rite Aid \$29.40
- 01/14/05 - Transfer to Acct. XXXXXX-8485 \$150.00 - Is this another account of the conservatee?
- 01/14/05 – Savings overdraft fees - \$10.00 - see CRC 7.1059(b)(1)
- 01/21/05 – Overdraft charge - \$5.00 - see CRC 7.1059(b)(1)
- 01/24/05 – Overdraft charge - \$5.00 - see CRC 7.1059(b)(1)
- 01/25/05 – Overdraft charge - \$5.00 - see CRC 7.1059(b)(1)
- 02/04/05 - Transfer to Acct. XXXXXX-8485 \$400.00 - Is this another account of the conservatee?
- 02/15/05 - Transfer to Acct. XXXXXX-8485 \$400.00 - Is this another account of the conservatee?
- 03/02/05 - Transfer to Acct. XXXXXX-8485 \$500.00 - Is this another account of the conservatee?
- 03/02/05 - Transfer to Acct. XXXXXX-8485 \$200.00 - Is this another account of the conservatee?
- 03/03/05 – Overdraft fee - \$22.00 - see CRC 7.1059(b)(1)
- 03/04/05 – Check 1156 payee not listed \$50.00
- 03/10/05 - Transfer to Acct. XXXXXX-8485 \$200.00 - Is this another account of the conservatee?
- 03/14/05 – Check 1157 payee not listed \$25.00
- 03/18/05 - Transfer to Acct. XXXXXX-8485 \$400.00 - Is this another account of the conservatee?
- 04/05/05 - Transfer to Acct. XXXXXX-8485 \$200.00 - Is this another account of the conservatee?
- 04/07/05 - Transfer to Acct. XXXXXX-8485 \$200.00 - Is this another account of the conservatee?
- 04/08/05 – Check 1159 payee not listed \$507.25
- 04/18/05 – Overdraft fee \$10.00 - see CRC 7.1059(b)(1)
- 04/18/05 – Check 1160, payee not listed \$250.00

04/29/05 - Transfer to Acct. XXXXXX-8485 \$10.00 - Is this another account of the conservatee?  
05/05/05 - Transfer to Acct. XXXXXX-8485 \$400.00 - Is this another account of the conservatee?  
05/16/05 - Transfer to Acct. XXXXXX-8485 \$500.00 - Is this another account of the conservatee?  
06/03/05 - Check 1161, payee not listed \$500.00  
06/16/05 - Transfer to Acct. XXXXXX-8485 \$100.00 - Is this another account of the conservatee?  
06/16/05 - Check 1162, payee not listed \$505.50  
06/16/05 - Check 1163, payee not listed \$60.00  
07/01/05 - Share of Cost of IHSS - \$377.00  
07/12/05 - Check 1164, payee not listed \$20.00  
07/12/05 - Check 1165, payee not listed \$10.00  
07/11/05 - Check 1166, payee not listed \$10.00  
07/15/05 - Check 1167, payee not listed \$30.00  
07/21/05 - Transfer to Acct. XXXXXX-8485 \$60.00 - Is this another account of the conservatee?  
07/22/05 - Check 1168, payee not listed \$27.96  
07/26/05 - Check 1169, payee not listed \$25.00  
07/27/05 - Overdraft fee - \$22.00  
07/29/05 - Overdraft fee - \$5.00  
08/04/05 - Share of cost IHSS - \$377.00  
08/08/05 - Check 1170, payee not listed \$500.00  
08/16/05 - Transfer to Acct. XXXXXX-8485 \$200.00 - Is this another account of the conservatee?  
09/15/05 - Share of cost IHSS - \$377.00  
09/16/05 - Check 1171, payee not listed \$500.00  
09/28/05 - Transfer to Acct. XXXXXX-8485 \$100.00 - Is this another account of the conservatee?  
10/04/05 - Share of cost IHSS - \$377.00  
10/07/05 - Check 1172, payee not listed \$50.00  
10/11/05 - Check 1173, payee not listed \$150.00  
10/13/05 - Online transfer to Pat Miranda - \$100.00  
10/17/05 - Check 1174, payee not listed \$250.00  
11/17/05 - Online transfer, payee not listed \$589.00  
11/21/05 - Check 1301, payee not listed \$352.50  
11/22/05 - Check 1302, payee not listed \$65.00  
12/09/05 - Pat Miranda, IHSS \$589.00  
12/12/05 - Check 1303, payee not listed \$25.00  
12/29/05 - Transfer to Acct. XXXXXX-8485 \$150.00 - Is this another account of the conservatee?  
01/03/06 - Pat Miranda, Share of Cost IHSS - \$589.00  
01/10/06 - Arizona Mail Order - \$50.00  
01/20/06 - Check 1304, payee not listed \$25.00  
01/20/06 - Check 1305, payee not listed \$50.00  
01/31/06 - Check 1306, payee not listed \$6.94  
02/03/06 - Pat Miranda, Share of Costs IHSS - \$589.00  
02/07/06 - Transfer to Acct. XXXXXX-8485 \$200.00 - Is this another account of the conservatee?  
02/08/06 - Returned check fee \$30.00 - see CRC 7.1059(b)(1)  
02/14/06 - Bill Pay Arizona Mail order - \$10.00  
03/03/06 - Pat Miranda, share of costs IHSS - \$589.00  
03/06/06 - Transfer to Acct. XXXXXX-8485 \$150.00 - Is this another account of the conservatee?  
03/06/06 - Transfer to Acct. XXXXXX-8485 \$100.00 - Is this another account of the conservatee?  
03/07/06 - Returned check fee \$30.00 - see CRC 7.1059(b)(1)  
03/22/06 - Transfer to Acct. XXXXXX-8485 \$50.00 - Is this another account of the conservatee?  
04/03/06 - Pat Miranda, share of costs IHSS - \$589.00  
04/04/06 - Check 1308, payee not listed \$20.00  
04/05/06 - Transfer to Acct. XXXXXX-8485 \$75.00 - Is this another account of the conservatee?

04/19/06 – Check 1309, payee not listed \$25.00  
04/24/06 - Transfer to Acct. XXXXXX-8485 \$100.00 - Is this another account of the conservatee?  
04/24/06 – Bill Pay Arizona Mail Order \$10.00  
05/08/06 – Pat Miranda, Share of costs IHSS \$402.00  
05/11/06 – Merrick Bank Credit Card Payment \$310.76 – Is this the conservatee's credit card?  
05/24/06 – Check 1311, no payee listed \$15.00  
05/26/06 – Check 1312, no payee listed \$638.00  
06/13/06 – Check 1313, no payee listed \$638.00  
07/14/06 – Check 1315, no payee listed \$1,224.00  
07/14/06 – Transfer to Checking? \$350.00

Age: 76 years DOB: 2/11/1936		<p><b>CONNIE RANA</b>, Conservator, is petitioner.</p> <p>Account period: 1/8/08 – 12/31/09</p> <p>Accounting - <b>\$782,889.76</b> Beginning POH- <b>\$642,039.07</b> Ending POH - <b>\$496,754.10</b></p> <p>Conservator - <b>waives</b></p> <p>Attorney - <b>\$2,000.00</b> (per Local Rule)</p> <p><b>Petitioner prays for an Order:</b></p> <ol style="list-style-type: none"> <li>Settling and allowing the third account and report and approving and confirming the acts of petitioner as filed;</li> <li>Authorizing Petitioner to pay her attorney the sum of \$2,000.00 for ordinary legal services provided to the conservator and the estate during the period of the account.</li> </ol>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 6/18/12.</b> Minute order states the court removes Ms. Rana as Conservator of the estate and appoints the Public Guardian. This accounting was continued to today's date and the court set a status hearing on 8/27/12 for the filing of the final accounting by the conservator and for a status report from the Public Guardian. As of 7/17/12 there have been no additional documents filed.</p> <ol style="list-style-type: none"> <li><b>Order dated 3/16/05 allowed the Conservator to fix the residence of the Conservatee to Las Vegas Nevada. With a provision that a conservatorship or its equivalent be established in the new state (Nevada) within 4 months. However, no conservatorship has been established in Nevada. Court may want to inquire about the establishment of a conservatorship in Nevada. – A copy of the Petition for Appointment of Guardian of the Person and Estate filed in Clark County, Nevada on 1/20/12 has been presented to the court.</b></li> </ol> <p><i>Please see additional page</i></p>																																																																			
<p>Cont. from 102511, 120611, 012412, 030812, 050712, 061812</p> <table border="1"> <tr><td><input type="checkbox"/></td><td>Aff.Sub.Wit.</td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Verified</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Inventory</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>PTC</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Not.Cred.</td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Notice of Hrg</td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Aff.Mail</td><td>W/</td></tr> <tr><td><input type="checkbox"/></td><td>Aff.Pub.</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Sp.Ntc.</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Pers.Serv.</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Conf. Screen</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Letters</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Duties/Supp</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Objections</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Video Receipt</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>CI Report</td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>2620(c)</td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Order</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Aff. Posting</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Status Rpt</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>UCCJEA</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Citation</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>FTB Notice</td><td></td></tr> </table>				<input type="checkbox"/>	Aff.Sub.Wit.		<input checked="" type="checkbox"/>	Verified		<input type="checkbox"/>	Inventory		<input type="checkbox"/>	PTC		<input type="checkbox"/>	Not.Cred.		<input checked="" type="checkbox"/>	Notice of Hrg		<input checked="" type="checkbox"/>	Aff.Mail	W/	<input type="checkbox"/>	Aff.Pub.		<input type="checkbox"/>	Sp.Ntc.		<input type="checkbox"/>	Pers.Serv.		<input type="checkbox"/>	Conf. Screen		<input type="checkbox"/>	Letters		<input type="checkbox"/>	Duties/Supp		<input type="checkbox"/>	Objections		<input type="checkbox"/>	Video Receipt		<input type="checkbox"/>	CI Report		<input checked="" type="checkbox"/>	2620(c)		<input checked="" type="checkbox"/>	Order		<input type="checkbox"/>	Aff. Posting		<input type="checkbox"/>	Status Rpt		<input type="checkbox"/>	UCCJEA		<input type="checkbox"/>	Citation		<input type="checkbox"/>
<input type="checkbox"/>	Aff.Sub.Wit.																																																																					
<input checked="" type="checkbox"/>	Verified																																																																					
<input type="checkbox"/>	Inventory																																																																					
<input type="checkbox"/>	PTC																																																																					
<input type="checkbox"/>	Not.Cred.																																																																					
<input checked="" type="checkbox"/>	Notice of Hrg																																																																					
<input checked="" type="checkbox"/>	Aff.Mail	W/																																																																				
<input type="checkbox"/>	Aff.Pub.																																																																					
<input type="checkbox"/>	Sp.Ntc.																																																																					
<input type="checkbox"/>	Pers.Serv.																																																																					
<input type="checkbox"/>	Conf. Screen																																																																					
<input type="checkbox"/>	Letters																																																																					
<input type="checkbox"/>	Duties/Supp																																																																					
<input type="checkbox"/>	Objections																																																																					
<input type="checkbox"/>	Video Receipt																																																																					
<input type="checkbox"/>	CI Report																																																																					
<input checked="" type="checkbox"/>	2620(c)																																																																					
<input checked="" type="checkbox"/>	Order																																																																					
<input type="checkbox"/>	Aff. Posting																																																																					
<input type="checkbox"/>	Status Rpt																																																																					
<input type="checkbox"/>	UCCJEA																																																																					
<input type="checkbox"/>	Citation																																																																					
<input type="checkbox"/>	FTB Notice																																																																					
		<p>Reviewed by: <b>KT</b></p> <p>Reviewed on: <b>6/11/12</b></p> <p>Updates:</p> <p>Recommendation:</p> <p><b>File 2 - Parks</b></p>																																																																				

## 2 (additional page 1 of 3) Darleen Joyce Parks (CONS/PE) Case No. 03CEPR01192

2. **Disbursement schedule shows payments bi-monthly of \$2,700 to Rana and Rana for rent. The court may require clarification regarding these rent payments and whether or not Rana and Rana has any relationship to the conservator. California Rules of Court 7.1059(a)(4) states the conservator must not engage his or her family members to provide services to the conservatee for a profit of fee when other alternatives are available. Where family members do provide services, their relationship must be fully disclosed to the court and their terms of engagement must be in the best interest of the conservatee compared with the terms available from other independent service providers.** – Declaration of Conservator filed on 11/30/11 states the rental property is owned by the conservator and her husband; however, the sub-market rent is not sufficient to pay the mortgage, property taxes, insurance, and maintenance costs for the property. Conservator states she and her husband do not make any profit from the conservatee's tenancy.
3. **Disbursement schedule shows several months where it appears the conservatorship is paying the cell phone of the live in care provider Sandra Martin. Court may require clarification.** – Declaration of Conservator filed on 11/30/11 states the cell phone payments for Sandra Martin, live in care provider, because the care provider would often take the conservatee to various places and therefore, it was required that the care provider have a cell phone. Because it was a requirement for this care provider, it was agreed that the conservatorship would pay the costs.
4. **Disbursement schedule shows several months where there are two payments per month for Las Vegas Valley Water (utilities), Pesky Pete's Pest control, Embarq (phone), Cox Enterprises (cable service), Southwest Gas (utilities), Republic Service (trash), Nevada Power (utilities). It appears the conservatorship may be paying for more than just the conservatee's expenses. Court may require clarification.** – Declaration of Conservator filed on 11/30/11 states some payment were made, on behalf of the care providers, as part of the "barter" agreement between the care providers and the conservator. The various utilities or cable services expenses would be paid, on occasion, for the conservatee at her residence and on occasion as the "barter" for services by a care provider.
5. **Disbursement schedule shows items purchased that should be included on the property on hand schedule such as:**
  - a. **3/11/08 – TV Surround + patio furniture for \$1,723.65**
  - b. **4/22/08 – Washer and dryer for \$1,578.90**
  - c. **12/22/09 – firmer sofa(?) – for \$2,196.19** - Declaration of Conservator filed on 11/30/11 states the purchases were necessary.
6. **Disbursement schedule shows gifts of cash on 12/28/09 to the conservatee's great nephews, Josh Rana - \$250.00 and Jacob Rana - \$200.00. California Rules of Court, Rule 7.1059(b)(3) states the conservator must refrain from making loans or gifts of estate property, except as authorized by the court after full disclosure.** – Declaration of Conservator filed on 11/30/11 states the cash gifts are minimal reflections of the conservatee's affection for her great nephews.

*Please see additional page*

## 2 (additional page 2 of 3) Darleen Joyce Parks (CONS/PE) Case No. 03CEPR01192

7. Disbursement schedule shows payments identified as Summerlin Dues (without stating the nature and purpose of the payment) as follows:
- 4/15/08 - \$271.00
  - 4/15/08 - \$271.00
  - 8/26/08 - \$271.00
  - 8/26/08 - \$271.00 - Declaration of Conservator filed on 11/30/11 states Summerlin is the name of the large planned development where the Conservatee (and conservator and her husband) reside. Because of the lower rental payments Conservator states she has paid (quarterly) the Summerlin assessment for the rental house. The four assessment payments are the only ones paid and the conservatorship has not been further charged for these homeowner assessments.
8. Disbursement schedule shows a transfer correction of \$250.00 on 12/22/08. Court may require clarification.
- Declaration of Conservator filed on 11/30/11 states the payment of \$250.00 was to the Nevada DMV to license Darlene's 2003 Jaguar.
9. Disbursement schedule shows a disbursement for "Home Warranty" in the amount of \$313.95 on 5/27/09. Court may require explanation as to why the conservatorship is paying for home warranty when renting (see item #2 above). - Declaration of Conservator filed on 11/30/11 states this is a 50-50 split for payment on the home warranty for the rental house.
10. Need Bank Statements as required by Probate Code 2620(c)(2).
11. This conservatorship was established in 2003. Property on hand schedule from the 2<sup>nd</sup> account ending on 12/31/2007 shows promissory notes (all apparently established during the 2<sup>nd</sup> account period) as follows:
- \$38,000 dated 6/27/05 from Aaron Wallace secured by a Deed of Trust with interest at 16% per annum
  - \$252,000.00 dated 7/19/05 from Aaron Wallace secured by a Deed of Trust with interest at 13% per annum.
  - \$60,000.00 dated 10/11/05 from John P. Rana and Kea Rana with interest at 4% per annum. (It appears that John P. Rana is the son of the petitioner.)
- Probate Code §2570 requires the Conservator to obtain prior court approval before investing money of the estate. There is nothing in the file to indicate the conservator obtained permission from the Court to invest money of the estate. - Declaration of Conservator filed on 11/30/11 states the promissory notes contained in the 2<sup>nd</sup> account were paid current, principal and interest included. All the notes were first trust deeds secured by real properties with sufficient equities. However, because the notes were of such a high rate of return (16% and 13% interest annum), the mortgagor was in danger of being unable to make further payments, which would have resulted in the requirement of the conservatorship to foreclose on the properties. To avoid foreclosure and subsequent costs incurred, and to avoid owning the properties, the conservator, through her husband who is a real estate investor, replaced these notes with other notes also secured by first trust deeds which are now paying at a more normal rate of return of 4%.

**Please see additional page**

**Dept. 303, 9:00 a.m. Monday, July 23, 2012**

## 2 (additional page 3 of 3) Darleen Joyce Parks (CONS/PE) Case No. 03CEPR01192

12. Property on hand schedule for this (the 3<sup>rd</sup>) accounting shows two promissory notes as follows:

- \$95,000 secured by 1209 Coral Isle Way, Las Vegas, NV with interest at 4% per annum and an outstanding balance of \$95,000.00
- \$205,000 secured by 11464 Crimson Rock, Las Vegas, NV with interest at 4% per annum and an outstanding balance of \$191,286.22.

It appears that the promissory notes in the second account are not the same promissory notes in the third account. What happened to the promissory notes in the second account? Where they paid in full? Need clarification and need change in asset schedule. – Declaration of Conservator filed on 11/30/11 states the questions raised herein are addressed in the answer above. All principal and interest payments and current interest rates and principal balances are recorded on the Third Account and Report are accurate.

**Failure to File a First Account or Petition for Final Distribution (Prob. C. 12200, et seq)**

<b>DOD: 9/20/03</b>	<p><b>CRYSTAL RUTH PUCKETT</b>, daughter and sole heir, was appointed as Administrator without bond on 11/18/2003 and Letters issued.</p> <p>I &amp; A - <b>\$395,387.86</b></p> <p>The first or final account was due in November 2004 and has not been filed.</p> <p>This status hearing was set for the filing of the first account or petition for final distribution.</p> <p>Notice of the status hearing was mailed to attorney, Curtis Rindlisbacher on June 14, 2012.</p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: KT</b>
		<b>Reviewed on: 7/17/12</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 3 - Swope</b>

**4A Jack H. Boghosian (Estate)**

**Case No. 11CEPR01034**

Atty Kruthers, Heather H (for Petitioner Public Administrator)  
 Atty Bagdasarian, Gary (for beneficiary California Armenian Home)  
 Atty Mosenbocker, Gary (for beneficiary Trinity Home Health Services)  
 Atty Poochigian, Mark (for Mike Shahinian)

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

DOD: 10/18/11	<b>PUBLIC ADMINISTRATOR</b> is petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> Additional analysis of this matter was completed by the research attorney. These examiner notes were prepared prior to the research attorney's involvement.</p> <p><b>Continued from 6/18/12.</b></p> <p>1. <b>Petition requests that the Decedent's audio Will dated 9/2/1993 be admitted to probate. Probate Code §6110 states in relevant part "a will shall be in writing." Need authority that allows the court to admit an audio will to probate. – Memorandum of Points and Authorities filed on 2/1/2012 by the California Armenian Home.</b></p> <p>2. <b>Need proof of holographic instrument for the handwritten notations on the will if the court is going to consider said handwritten notations as a codicil to the decedent's witnessed will. – Declaration of Herbert I. Levy filed on 3/29/12 states he has known Mr. Boghosian approximately 55 years. He has listened to the audio tape and it is very apparent to him that the voice on the tape is that of Mr. Boghosian.</b></p> <p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 7/17/12</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 4A - Boghosian</b></p>
	<b>PUBLIC ADMINISTRATOR</b> was appointed Special Administrator with general powers on 2/16/2012. Letters of Special Administration expire on 7/23/12.	
Cont. from 011912, 021612, 040512, 050212, 060612, 061812	Full IAEA – o.k.	
Aff.Sub.Wit.	Will dated: 8/11/1972	
✓ Verified	Audio Will dated: 9/2/1993	
Inventory	Residence: Fresno	
PTC	Publication: Fresno Business Journal	
Not.Cred.		
Notice of Hrg		
✓ Aff.Mail	W/	
✓ Aff.Pub.		
Sp.Ntc.	<b>Estimated value of the Estate:</b>	
Pers.Serv.	Personal property - \$464,027.00	
Conf. Screen	Real property - \$130,000.00	
✓ Letters	<b>Total - \$594,027.00</b>	
Duties/Supp		
Objections	<b>Probate Referee: STEVEN DIEBERT</b>	
Video Receipt		
CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

**Memorandum of Points and Authorities in Support of Petition for Probate filed by the California Armenian Home on 2/1/12.**

A holographic codicil may be placed on the face of a witnessed will, and is valid if it meets the requisites of a holographic instrument (written in the testator's hand, dated and signed). [*Estate of Nielson* (1980) 105 Cal.App.3d 796, 802-805] Witkins defines "codicil" as "a later testamentary instrument or entry on an original testamentary instrument that supplements or otherwise affects its validity or terms." [14 Witkin, *Summary of California Law* (10th ed.(2005), Wills, §159]

The handwritten notation of Mr. Boghosian on the face of his witnessed will appears to constitute a holographic codicil, since it appears to be in his handwriting, is dated and signed, and supplements or otherwise affects the validity or terms of his earlier witnessed will.

A holographic codicil may incorporate by reference another writing (formal or informal, attested or unattested) as long as the reference is unmistakable or can be deemed unmistakable by reference to extrinsic evidence. [*In re Foxworth's Estate* (1966) 240 Cal.App.2d 784, 788] The required elements to establish incorporation by reference are: (1) the incorporated writing must be in existence at the time the codicil makes reference to it; (2) the codicil must identify the incorporated writing by a sufficiently certain description, and extrinsic evidence is admissible to aid the identification; and, (3) it must appear that the testator intended to incorporate the writing for the purpose of carrying out his testamentary desires. [id. at pages 788-789]

The handwritten notation of Mr. Boghosian on his witnessed will appears to constitute a holographic codicil that incorporates by reference two separate writings for the purpose of carrying out his testamentary desires.

First, the holographic codicil incorporates the tape recording that Mr. Boghosian specifically identifies and states that he "made" on September 2, 1993 "to supersede" his witnessed will. This establishes the elements of existence, identification and intent. The element of identification is also established by the extrinsic evidence consisting of Mr. Boghosian's handwritten notations on the tape itself, and on the envelope in which his witnessed will and tape were found.

Second, the holographic codicil incorporates Mr. Boghosian's witnessed will by referring to "this will" as the testamentary instrument he sought to "supersede" with the tape recorded instructions.

Finally, the tape recording should be considered a proper matter to be incorporated by reference notwithstanding that case law on the issue generally refers to "documents" being incorporated by reference. Probate Code §6130 governs incorporation by reference, and refers to a "writing" as the type of matter which may be incorporated by reference (not a "document" or "paper"). The Probate Code does not define the word "writing" and does not exclude probate proceedings from the rules of evidence, so the provisions of the Evidence Code may be applied to determine the meaning of the word "writing" used in Probate Code §6130. [Evidence Code §300; and see, *Estate of Nicholas* (1986) 177 Cal.App.3d 1071, 1088]

Evidence Code §250 provides the following definition for the word "writing:"  
"'Writing' means handwriting, typewriting, printing, photostating, photographing, photocopying, transmitting, by electronic mail or facsimile, and every other means of recording upon any tangible thing, any form of communication or representation, including letters, words, pictures, sounds, or symbols, or combinations thereby created, regardless of the manner in which the record has been stored."

Tape recordings are considered "writings" under the Evidence Code. [*Darley v. Ward* (1980) 28 Cal.3d 257,261] Since the tape recording made by Mr. Boghosian is a "writing" it is subject to being incorporated by reference in his holographic codicil.

Therefore, request is made that the Will of Jack H. Boghosian dated August 11, 1972 be admitted with the taped testamentary document described in Attachment 3e(2) to the Petition of the Fresno County Public Administrator as the codicil of the Decedent.

**Memorandum of Points and Authorities filed by Trinity Home Health Services dba Saint Agnes Home Health and Hospice, beneficiary filed on 2/14/12.**



Atty Kruthers, Heather H (for Petitioner Public Administrator)  
 Atty Bagdasarian, Gary (for beneficiary California Armenian Home)  
 Atty Motsenbocker, Gary (for beneficiary Trinity Home Health Services)  
 Atty Poochigian, Mark (for Mike Shahinian)

**Notice of Demurrer and Demurrer to Petition for Probate of Will and Letters of Administration With Will Annexed**

for

	MIKE SHAHINIAN, intestate heir, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  Analysis of this matter was completed by the research attorney therefore examiner notes have not been prepared.
<b>Cont. from 060712</b>		
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: 7/17/12	
	Updates:	
	Recommendation:	
	File 4C - Boghosian	

Age: 4	<b>No Temporary Requested</b>		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Continued from 07/02/2012</u>  <b>Minute order, Judge John Vogt presiding, states the Court orders that a Court Investigator re-refer this matter to CPS within 10 days. Matter to be expedited.</b></p>
	<p><b>DIANA RUIZ</b>, maternal grandmother is petitioner</p>		
	<p>Father: <b>RALPH BEJAR</b>, Court waives notice per minute order of 07/02/2012</p>		
Cont. from 070212	<p>Mother: <b>ERICA ALCORN</b>, personally served 05/02/2012</p>		
Aff.Sub.Wit.	<p>Paternal grandparents: Unknown, Court waives notice per minute order of 07/02/2012</p>		
✓ Verified	<p>Maternal grandfather: Ivan Alcorn, sent notice by mail 05/04/2012.</p>		
Inventory	<p><b>Petitioner alleges:</b> she fears for the safety and welfare of the child. Mother was arrested 03/12/2012 for possession of a controlled substance, she was arrested when officers found narcotics in her youngest child's jacket. Petitioner believes that the Mother leaves the child in the care of felons, drug users and drug distributors. Petitioner is fearful that the Mother will take the child out of California and hide the child from the Petitioner. Mother sent the Petitioner a text that stated she was on her way to Vegas and that the Petitioner would never see the child again. On two occasions the Petitioner picked the child up and the child had an injury to her head and an injury to her foot. Petitioner states that she has filed multiple CPS reports.</p>		
PTC	<p>Petitioner requests that notice for the Father be dispensed as indicated in her Declaration Regarding Efforts to Find Minor's Father and Minor's Paternal Grandparents. The declaration states that Father was not present at the child's birth and has only seen the child once in her life when she as a few weeks old. Child's Mother never disclosed the names or address of the paternal grandparents.</p>		
Not.Cred.	<p>Petitioner requests supervised visitation between the mother and the child with Petitioner supervising visits.</p>		
✓ Notice of Hrg	<p><b>Court Investigator Charlotte Bien's report filed 06/25/2012.</b></p>		
✓ Aff.Mail	<p><b>DSS Social Worker Jennifer Cooper's report filed 06/26/2012.</b></p>		
Aff.Pub.	<p><b>DSS Social Worker Jennifer Cooper's Supplemental Report filed 07/18/2012.</b></p>		
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><b>Reviewed by:</b> KT/ LV</p>		
	<p><b>Reviewed on:</b> 07/17/2012</p>		
	<p><b>Updates:</b></p>		
	<p><b>Recommendation:</b></p>		
	<p><b>File 5 - Alcorn</b></p>		

<b>Age:</b> 8	<b>Temporary Expires</b> 07/23/12	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. 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: <ul style="list-style-type: none"> <li>• Frank Villalobos (Father)</li> </ul> </li> <li>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"> <li>• Laura Kraft (Maternal grandmother)</li> </ul> </li> <li>3. Attorney Hicks did not sign the Petition for Appointment of Guardian of Minor.</li> </ol>
	<b>FRANK VILLALOBOS</b> , former step-father, is Petitioner.	
	Father: <b>VICTORINO PASCUA</b>	
<b>Cont. from</b>	Mother: <b>APPLE VILLALOBOS</b> , personally served on 06/22/2012	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Paternal grandfather: Deceased	
<input checked="" type="checkbox"/> <b>Verified</b>	Paternal grandmother: Deceased	
<input type="checkbox"/> <b>Inventory</b>	Maternal grandfather: Antonio Paule, served by mail 06/02/2012	
<input type="checkbox"/> <b>PTC</b>	Maternal grandmother: Laura Kraft	
<input type="checkbox"/> <b>Not.Cred.</b>	<b>Petitioner alleges:</b> that the child is currently in his care and that petitioner needs the legal ability to make school and medical decisions for the child. He states that the mother is planning to go to the Philippines for 4 to 6 months and will not be taking the child with her. The child's father resides in the Philippines. Petitioner states that the child will continue to live with him when his mother returns from the Philippines. Guardianship is necessary to keep the child on the petitioner's medical insurance.	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input checked="" type="checkbox"/> <b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>		
<input checked="" type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>	<b>Court Investigator Dina Calvillo's report filed 07/17/2012.</b>	
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input checked="" type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> KT / LV
		<b>Reviewed on:</b> 07/17/2012
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 6 – Paule</b>

Petition for Appointment of Guardian of the Estate (Prob. C. 1510)

Age: 15 years	THERE IS NO TEMPORARY. No temporary was requested.		NEEDS/PROBLEMS/COMMENTS:
	CYNTHIA DONDLINGER, mother, is petitioner and requests appointment as Guardian of the estate with bond set at \$26,376.98.		
Cont. from	Estimated value of the Estate: <b>\$26,376.98</b>		1. Local Rule 7.8 I states absent a showing of good cause, it is the policy of the court to block all funds in Guardianship Estates. If the court requires the funds to be placed into a blocked account will need blocking order.
Aff.Sub.Wit.	Father: <b>ANTHONY DONDLINGER</b> – deceased.		
✓ Verified	Paternal grandfather: Bill Dondlinger – deceased		2. Notice to Carol Dondlinger, paternal grandmother was sent “in care of” Victoria Dondlinger. California Rules of Court, Rule 7.51 requires direct notice, unless the person entitled to notice is an adult and has directed the party giving notice in writing to send the notice in care of the second person.
Inventory	Paternal grandmother: Carol Dondlinger – served on 5/31/12.		
PTC	Maternal grandfather: Frederic Tosi – deceased		<b>Note:</b> If the petition is granted, status hearings will be set as follows:
Not.Cred.	Maternal grandmother: Freda Tosi – consents and waives notice.		
✓ Notice of Hrg	Minor: Tyler Dondlinger – consents and waives notice.		<ul style="list-style-type: none"> <li>• <b>Friday, August 17, 2012</b> at 9:00 a.m. in Department 303, for the filing of the bond or receipt for blocked account;</li> <li>• <b>Friday, November 30, 2012</b> at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal; and</li> <li>• <b>Friday, September 20, 2013</b> at 9:00 a.m. in Department 303, for the filing of the first account.</li> </ul>
✓ Aff.Mail w/	Petitioner states the minor is a beneficiary under his father's Annuity Trust Fund at Carpenter Funds. Carpenter Fund requires a guardianship in order to distribute the funds to her.		
Aff.Pub.			Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
Sp.Ntc.			
Pers.Serv.			<b>Reviewed by: KT</b>
✓ Conf. Screen			
✓ Letters			<b>Reviewed on: 7/17/12</b>
✓ Duties/Supp			
Objections			<b>Updates:</b>
Video Receipt			
CI Report N/A			<b>Recommendation:</b>
9202			
✓ Order			<b>File 7 - Dondlinger</b>
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

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

Age: 92 DOB: 04/16/20	<b>TEMPORARY EXPIRES 07/23/12</b>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Court Investigator Advised Rights on 07/12/12.</p> <p><b>Note: If the petition is granted status hearings will be set as follows:</b></p> <ul style="list-style-type: none"> <li>• Friday, 11/16/2012 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u></li> <li>• Friday, 09/13/2013 at 9:00a.m. in Dept. 303 for the filing of the first account.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p> <p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 07/18/12</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b> File 8 - Haney</p>
	<p><b>ANITA LEAL-IDROGO</b>, daughter, is Petitioner and requests appointment of herself as Conservator of the Person with certain medical consent powers, and of <b>BRUCE D. BICKEL</b>, professional fiduciary, as Conservator of the Estate with bond of \$1,298,519.36.</p> <p><b>Estimated Value of Estate:</b>                  Personal property: \$1,122,077.80                  Annual income: \$ 54,000.00                  Total: \$1,176,077.80                  Plus cost of recovery: \$ 112,441.56                  Total bond: \$1,298,519.36</p> <p><b>Petitioner states</b> Ms. Haney suffers from a myriad of medical conditions including psychosis, dementia, depression, hypothyroidism, hypoglycemia, urinary tract infection (UTI) and Diabetes Mellitus II. On a continual basis she refuses preventative medical treatment associated with the control of these conditions, especially diabetes. She has already undergone a below-the-knee right leg amputation as a result of her diabetes and her left leg is currently causing pain and requires attention; however, she refuses medical attention and continues to take her insulin <u>at will</u> instead of using a monitor. Petitioner also states that Ms. Haney needs assistance in taking her medication properly, she will often forget whether or not she took an earlier dosage leading to taking too much.</p> <p><b>Petitioner further states</b> that Ms. Haney appears unwilling or unable to handle her financial affairs, although she is insistent that she is able to handle them herself. Petitioner states that she has determined that Ms. Haney has failed to make payments on her PG&amp;E and water bill in the past and has received shut off notices.</p> <p style="text-align: center;"><b>Continued on Page 2</b></p>	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv.		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input checked="" type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input checked="" type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		

Due to Ms. Haney's extreme resistance to assistance concerning her financial affairs, Petitioner believes that a neutral professional third party would be appropriate to handle Ms. Haney's day to day finances.

**Petitioner filed a declaration on 6-22-12 with additional current information stating:**

- Ms. Haney's recent ex-husband Harry Baker had been attempting to care for her even after their divorce was finalized in March, but because of Ms. Haney's uncontrolled volatility, hostility and aggressiveness and refusal to allow assistance or a cleaning service, Mr. Baker's attorney (Robert Bergstrom) contacted petitioner. When she traveled to visit, she found these conditions which have prompted this petition.
- Petitioner originally found that mention of Mr. Baker upset her mother, so she asked him to stay away for a time. However, more recently, he has been visiting every day at the facility, they go to church together, and she enjoys his company. Petitioner states that as Conservator, she would not restrict any visitors, including Mr. Baker, so long as they are not interfering with the internal workings/schedule of the facility.
- Ms. Haney was originally upset at being placed at Cedar Creek, but has since become comfortable and has requested that her furniture be brought over. However, she became upset when her Pomeranian dog was not allowed in the apartment and became angry and cursed at Petitioner.
- Petitioner states her brother Alfred Leal was originally in support of her petition, but upon travel to Fresno, learned that he lives in their mother's home rent-free and is supported by their mother's income. He also refused to assist her and indicated that he could not be around their mother too much because he could not handle the stress. However, he later requested to be a Co-Conservator with Petitioner, but when Petitioner expressed discomfort with this due to his previously expressed inability to assist and his financial dependence, he became angry and has since accused Petitioner of limiting access to Ms. Haney.

**Court Investigator Jennifer Young filed a report on 07/17/12.**

Age: 14	REBEKAH AYERS, cousin, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Notice of Hearing  2. Need proof of service fifteen (15) days prior to the hearing of the Petition for Termination of Guardianship or declaration of due diligence for: <ul style="list-style-type: none"> <li>• Father (Unknown)</li> <li>• Sharon Gomez (Mother)</li> <li>• Paternal grandparents (Unknown)</li> <li>• Albert Gomez (Maternal grandfather)</li> <li>• Felicia Gomez (Minor)</li> </ul>
	Petitioner was appointed guardian on 02/01/2007.	
Cont. from	Father: <b>UNKNOWN</b>	
Aff.Sub.Wit.	Mother: <b>SHARON GOMEZ</b>	
✓ Verified	Paternal grandparents: Unknown	
Inventory	Maternal grandfather: Albert Gomez	
PTC	Maternal grandmother: Cheryl Gomez, Deceased	
Not.Cred.	<b>Petitioner states:</b> behavioral issues, financial hardship and the child wants to be reunited with her mother. Minor and the mother are causing problems. Minor has special needs that the petitioner cannot meet.	
Notice of Hrg	<b>Court Investigator Julie Negrete's report filed 07/17/2012.</b>	
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 / LV
		Reviewed on: 07/17/2012
		Updates:
		Recommendation:
		File 9 - Gomez

**Status Re: Accounting**

<b>DOD: 6-5-09</b>		<b>ROCKY BUCCI</b> was appointed Administrator with full IAEA and without bond on 7/28/09.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
			<b>Continued from 4-30-12., 6-11-12.</b>
		I & A filed 8/5/2009 reflects a total estate value of \$64,650.00, consisting of real property (house and mobile home), miscellaneous household furniture, and two vehicles.	<b>Minute Order 4-30-12:</b> Mr. Bucci advises the Court that the house has a principle of \$67,778.87. Matter continued to 6-11-12. The Court orders Joanne Sanoian and Rocky Bucci to be present on 6-11-12. A copy of the minute order was mailed to Joanne Sanoian on 5-4-12.
<b>Cont. from 043012, 061112</b>		The first account or petition for final distribution was due 7/28/2010.	<b>Note:</b> The Administrator was previously represented by Attorney JoAnn Sanoian; however, pursuant to Substitution of Attorney filed 3-7-12, the Administrator is now self-represented. Attorney Sanoian has filed a Request for Special Notice in this proceeding.
<b>Aff.Sub.Wit.</b>		The Court set a status hearing for the filing of the first account or petition for final distribution on 3/5/12.	<b>Minute Order 6-11-12:</b> Matter continued to 7-23-12.
<b>Verified</b>			<b>As of 7-18-12, nothing further has been filed. The following issue remains:</b>
<b>Inventory</b>			<b>1. Need first account or petition for final distribution pursuant to Probate Code §12200.</b>
<b>PTC</b>			<b>Note:</b> According to the prior status report, the Administrator does not want to sell the property until the market improves. The Court may require information regarding the current status of the assets including the real property, cash and vehicles. For instance, is the real property occupied or vacant? Is rent being collected? How does this benefit the estate?
<b>Not.Cred.</b>			<b>Reviewed by:</b> KT / skc
<b>Notice of Hrg</b>			<b>Reviewed on:</b> 7-18-12
<b>Aff.Mail</b>			<b>Updates:</b>
<b>Aff.Pub.</b>			<b>Recommendation:</b>
<b>Sp.Ntc.</b>			<b>File 10 - Bucci</b>
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>	X		
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			

**Petition for Termination of Guardianship**

Isaiah Avila Age: 6 DOB: 08/05/2005	<b>ULISES E. AVILA</b> , father, is petitioner.  <b>MARIA ANGUIANO</b> , paternal grandmother was appointed guardian on 03/07/2011.  Mother: <b>ANA ROMERO</b>  Paternal grandfather: Emiliano Avila  Maternal grandfather: Francisco Romero Maternal grandmother: Juana Romero  <b>Petitioner states:</b> father wants to regain custody of the children.  <b>Court Investigator Samantha Henson's report filed 07/16/2012.</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Notice of Hearing  2. Need proof of service fifteen (15) days prior to the hearing of the Petition for Termination of Guardianship or declaration of due diligence for: <ul style="list-style-type: none"> <li>• Ana Romero (Mother)</li> <li>• Emiliano Avila (Paternal grandfather)</li> <li>• Francisco Romero (Maternal grandfather)</li> <li>• Juana Romero (Maternal grandmother)</li> </ul>
Destiney Avila Age: 4 DOB: 05/02/2008		
<b>Cont. from</b>		
<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		
		<b>Reviewed by:</b> KT / LV <b>Reviewed on:</b> 07/18/2012 <b>Updates:</b> <b>Recommendation:</b> <b>File 11 - Avila</b>

Atty Venegas Lopez, Frances Marie (Pro Per – Mother – Petitioner)  
 Atty Grider, Roman (Pro Per – Maternal Cousin – Co-Guardian of Ruby)  
 Atty Acevedo, Monica (Pro Per – Girlfriend of Roman Grider – Co-Guardian of Ruby)  
 Atty Grider Venegas, Helen (Pro Per – Maternal Aunt – Guardian of Jessica)  
 Atty Grider, Bobby Joe (Pro Per – Maternal Uncle – Guardian of Faith)  
 Atty Cardenas, Monica Nallely (Pro Per – Paternal Aunt – Guardian of Ruben and Isaiah)

Petition for Termination of Guardianship

Faith Rose Venegas (12) DOB: 12-7-98	<b>FRANCES LOPEZ</b> , Mother, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
Jessica Garcia (8) DOB: 11-17-02	On 6-20-11, guardians were appointed for all five minors. At this time, guardianship is as follows:	<u>Continued from 12-13-11, 6-12-12.</u>
Ruben Venegas (7) DOB: 11-22-03	<ul style="list-style-type: none"> <li>Roman Grider and Monica Acevedo are Co-Guardians of Ruby.</li> </ul>	<u>This hearing is for termination of guardianship of Jessica and Faith only.</u>
Isaiah Venegas (5) DOB: 5-30-06	<ul style="list-style-type: none"> <li>Helen Grider Venegas is Guardian of Jessica.</li> </ul>	
Ruby Frances Garcia (2) DOB: 2-16-09	<ul style="list-style-type: none"> <li>Bobby Joe Grider is Guardian of Faith.</li> </ul>	
Cont. from 121311, 061212	<ul style="list-style-type: none"> <li>Monica Nallely Cardenas is Guardian of Ruben and Isaiah. - Ms. Cardenas signed the consent and waiver of notice on the Petition.</li> </ul>	<u>Termination was granted for Ruby, Ruben and Isaiah only on 12-13-11.</u>
Aff.Sub.Wit.	Father (Jessica, Ruben, Isaiah, Ruby): Ruben F. Garcia Paternal grandfather: Angel Garcia Paternal grandmother: Patricia Garcia	
<input checked="" type="checkbox"/> Verified	Father (Faith): Moises Vargas Paternal Grandfather: Not provided Paternal Grandmother: Not provided	<b>Minute Order 12-13-11 states:</b> The Court states that it is not detrimental for the children to return to mother. The Court further orders for Jessica and Faith stay with Guardians to finish their school year. Petition is granted for Ruben, Isaiah and Ruby only. Matter continued to 6-12-12 for Jessica and Faith.
Inventory	Maternal grandfather: Joe Venegas Maternal grandmother: Mary Venegas - Deceased	
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	<b>Petitioner states</b> she regrets her choices and it seems like an eternity since the children were separated from her and from each other. She is doing everything she can to correct her mistakes that lead the family to this point. She has completed anger management and is still attending rehabilitation counseling for her medication addictions. She would very much like the children returned to her care; however, if Faith (12), who is living in Hanford, prefers to finish the school year there, that is fine. Petitioner thanks the Court for the opportunity to continue raising her children. Petitioner includes certificates of completion from a parenting program and a batterer's intervention program, and a letter in support from a rehabilitation counselor regarding her progress.	
Letters		
Duties/Supp		
Objections		
Video Receipt		
<input checked="" type="checkbox"/> CI Report	<b>Court Investigator Dina Calvillo filed a report on 12-8-11 with regard to all of the children.</b>	
Clearances		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

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

<b>DOD: 05/20/2012</b>	<b>DOROTHEA D. LANEY</b> , daughter is petitioner and requests appointment as Administrator without bond.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need Affidavit of Publication</li> <li>2. #5a(3) or #5a(4) of the petition regarding registered domestic partner was not answered.</li> <li>3. #5a(7) or #5a(8) of the petition regarding issue of predeceased child was not answered.</li> <li>4. Petition indicates the estimated value of the estate is \$0. Court may inquire about the estate value.</li> </ol> <p><b>Note: If the petition is granted status hearings will be set as follows:</b></p> <ul style="list-style-type: none"> <li>• <b>Friday, 01/04/2013 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <b>and</b></li> <li>• <b>Friday, 09/27/2013 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
	All heirs waive bond.	
<b>Cont. from</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>	Full IAEA - ?	
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Decedent died intestate	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>	Residence: Fresno Publication: <b>NEEDED</b>	
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>	<b>Estimated value of the estate:</b> Personal property - \$0 Real property - \$0 <b>Total: - \$0</b>	
<input checked="" type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>	Probate Referee: Steven Diebert	
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
<b>Reviewed by:</b> KT / LV		
<b>Reviewed on:</b> 07/18/2012		
<b>Updates:</b>		
<b>Recommendation:</b>		
<b>File 14 - James</b>		