

Attorney: Gary G. Bagdasarian (Court Appointed for Conservatee)

Attorney: Catherine Sharbaugh (for Salvador Ramirez, suspended Conservator)

Attorney: Heather H. Kruthers (for Public Guardian, temporary Conservator)

Order to Show Cause Re: Determination of Salvador Ramirez's suitability to Continue as Conservator of the Person

	SALVADOR RAMIREZ , son, was appointed as conservator of the person on 1/21/2005.	NEEDS/PROBLEMS/COMMENTS:
	On 6/29/15 the Court suspended the powers of Salvador Ramirez as conservator of the person and appointed the Public Guardian as temporary conservator.	
Cont. from	Order dated 6/19/15 set this Order to Show Cause hearing and ordered Salvador Ramirez to appear and show cause why he should not be removed as conservator. – Order was mailed to Salvador Ramirez, Catherine Sharbaugh, Gary Bagdasarian and Heather Kruthers on 6/29/15.	
Aff.Sub.Wit.	Letters of Temporary Conservatorship were issued to the Public Guardian on 7/7/15.	
Verified	Court Investigator Julie Negrete's Report filed on 6/29/15.	
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: 7/27/15
		Updates:
		Recommendation:
		File 1 – Villegas

2A Paul Harvey Wallace (Estate)
Atty Donaldson, Larry A. (pro per – former Executor)
Atty Kruthers, Heather H. (for Public Administrator – successor Administrator)

Case No. 08CEPR00294

Amended Trust Accounting for 2007, 2008, 2009, 2010, 2011, 2012 and Partial Accounting 2013

DOD: 06/22/07	<p>LARRY A. DONALDSON, friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>See Page 12 for a related matter.</p>
	<p>The Court accepted Mr. Donaldson's withdrawal as executor on 7/26/13 and appointed the Public Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.</p>	<p>CONTINUED FROM 06/24/15</p> <p>Minute Order from 06/24/15 states: Mr. Rindlisbacher reports that he received the records and is working on amending the account.</p> <p>As of 07/27/15, nothing further has been filed.</p> <p>1. The accounting does not comply with the Probate Code, specifically the format for accountings outlined in Probate Code §1060. In addition the accounting appears to be for the Paul Harvey Wallace Trust. The Paul Harvey Wallace Trust is not before the court. Mr. Donaldson needs to file an accounting for the Estate of Paul Harvey Wallace.</p>
<p>Cont. from 040714, 050514, 070714, 090814, 102314, 012115, 032515, 062415</p>		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
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Sp.Ntc.		
Pers.Serv.		
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Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 07/27/15
		Updates:
		Recommendation:
		File 2A – Wallace

2B Paul Harvey Wallace (Estate)

Case No. 08CEPR00294

Atty Donaldson, Larry A. (former Executor)

Atty Kruthers, Heather H. (for Public Administrator – Successor Administrator)

Order to Show Cause Re: Failure to Appear; Imposition of Sanctions in the Amount of \$600.00

DOD: 06/22/07	LARRY A. DONALDSON, friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.	NEEDS/PROBLEMS/COMMENTS:
	On 07/26/13, LARRY DONALDSON resigned as Executor and the PUBLIC ADMINISTRATOR, was appointed as Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.	<p>CONTINUED FROM 06/24/15 Minute Order from 06/24/15 states: The Court imposes the previously ordered \$600.00 sanction as to Mr. Donaldson and orders that it be paid within one week.</p> <p>As of 07/27/15, nothing further has been filed and it does not appear that the sanctions have been paid.</p>
Cont. from 010214, 013014, 022014, 041714, 050514, 070714, 090814, 102314, 012115, 032515, 062415		
Aff.Sub.Wit.	Minute order from 12/05/13 set this matter for an Order to Show Cause and states: The Court sets the matter for an Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to appear and imposition of sanctions in the amount of \$600.00. The Court sets a further Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to provide information to the successor administrator timely and imposition of sanctions in the amount of \$800.00. Larry Donaldson is ordered to be personally present on 01/02/14.	
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		Reviewed by: JF
Status Rpt		
UCCJEA		Reviewed on: 07/27/15
Citation		
FTB Notice		Updates:
		Recommendation:
		File 2B – Wallace

2C Paul Harvey Wallace (Estate)

Case No. 08CEPR00294

Atty Donaldson, Larry A. (former Executor)

Atty Kruthers, Heather H. (for Public Administrator – Successor Administrator)

Order to Show Cause Re: Failure to Provide Information to the Successor Administrator Timely; Imposition of Sanctions in the Amount of \$800.00

DOD: 06/22/07	LARRY A. DONALDSON, friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.	NEEDS/PROBLEMS/COMMENTS:
	On 07/26/13, LARRY DONALDSON resigned as Executor and the PUBLIC ADMINISTRATOR , was appointed as Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.	CONTINUED FROM 06/24/15 Minute Order from 06/24/15 states: The Court imposes the previously ordered \$800.00 sanction as to Mr. Donaldson and orders that it be paid within one week.
Cont. from 010214, 013014, 022014, 050514, 070714, 090814, 102314, 012115, 032515, 062415	On 07/26/13, LARRY DONALDSON resigned as Executor and the PUBLIC ADMINISTRATOR , was appointed as Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.	As of 07/27/15, nothing further has been filed and it does not appear that the sanctions have been paid.
Aff.Sub.Wit.	Minute order from 12/05/13 set this matter for an Order to Show Cause and states: The Court sets the matter for an Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to appear and imposition of sanctions in the amount of \$600.00. The Court sets a further Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to provide information to the successor administrator timely and imposition of sanctions in the amount of \$800.00. Larry Donaldson is ordered to be personally present on 01/02/14.	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 07/27/15
		Updates:
		Recommendation:
		File 2C – Wallace

Second and Final Account and Report of Personal Representative and Petition for Its Settlement; Petition to Determine Entitlement to Estate Distribution, and for Allowance of Commission and Attorneys' Fees for Ordinary and Extraordinary Services; and for Final Distribution

DOD: 01/21/10	DOUGLAS J. GEIST , Administrator, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Examiner is unable to verify the proposed distribution because it does not appear that enough information has been provided to calculate the percentage to be distributed to each heir based on their degree of relationship to the decedent. Need more information.</p>
	Account period: 09/08/12 – 03/31/15	
Cont. from	Accounting - \$57,215.98	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$93,469.78	
<input checked="" type="checkbox"/> Verified	Ending POH - \$52,955.63	
<input checked="" type="checkbox"/> Inventory	Administrator (statutory) - \$3,669.29	
<input checked="" type="checkbox"/> PTC	Attorney - \$3,669.29	
<input checked="" type="checkbox"/> Not.Cred.	Attorney x/o - \$4,884.50	
<input checked="" type="checkbox"/> Notice of Hrg	(itemized by date for preparation of payroll and income tax returns and sales of real property)	
<input checked="" type="checkbox"/> Aff.Mail w/	Costs - \$590.97	
Aff.Pub.	(certified copies, filing fees, copies and postage for more than 10 recipients)	
Sp.Ntc.	Closing - \$2,500.00	
Pers.Serv.	The following Creditor's Claims have been allowed and will be paid:	
Conf. Screen	Data Central Collection Bureau, LLC - \$990.50	
Letters	Education Employees Credit Union - \$6,807.97	
Duties/Supp	Valerie Whittington - \$300.00	
Objections	Elizabeth Rodarte - \$820.50	
Video Receipt	Distribution, pursuant to intestate succession, is to:	
CI Report	Continued on Page 2	
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
<input checked="" type="checkbox"/> FTB Notice		

Reviewed by: JF

Reviewed on: 07/27/15

Updates:

Recommendation:

File 3 – Geist

Page 2

Terry Geist	-	\$1,795.15	Robert Tidd	-	\$1,197.00
Deney Geist	-	\$1,795.15	Richard Dahms	-	\$2,392.59
Douglas J. Geist	-	\$1,196.87	James Dahms	-	\$2,392.59
Vicki Patton	-	\$1,196.87			
Elaine Beck	-	\$1,196.87			
Grace Kaiser	-	\$897.57			
Wayne Phelps	-	\$897.57			
Betty Reed	-	\$897.57			
Jim Phelps	-	\$897.57			
Phillip Francis	-	\$132.96			
Perry Francis	-	\$132.96			
Matthew Francis	-	\$132.96			
Margo Wilde	-	\$199.45			
Michael Ray Sipe, Jr.-		\$66.48			
Sandy Prall	-	\$66.48			
Sonja Gapinski	-	\$66.48			
Patricia Scales	-	\$132.99			
Carol Smith	-	\$132.99			
Vicki Haskins	-	\$132.96			
Elmer L. Francis estate -		\$398.92			
Betty Joan Rhodes	-	\$398.92			
Marvin Francis	-	\$99.72			
Norman Francis	-	\$99.72			
John Francis	-	\$99.72			
Kendall Francis	-	\$99.75			
Max B. Jackson*	-	\$398.92			
Rex Wayne Jackson-		\$398.92			
Donald Max Francis -		\$398.92			
Gary Stephen Newman -		\$399.09			
Sharon E. Chambers-		\$399.09			
Carol Reynolds	-	\$266.09			
Teri Lago	-	\$266.06			
Russell Newman	-	\$266.06			
Evette N. Newman	-	\$199.47			
Joshua Newman	-	\$49.89			
Ashley Silva	-	\$49.86			
Gregory Newman	-	\$49.86			
Matthew Newman	-	\$49.86			
Adrienne Newman	-	\$199.47			
Michael Newman	-	\$199.47			
William Newman	-	\$199.47			
Kerry Newman	-	\$199.47			
Patricia Newman	-	\$199.47			
Shirley Raleigh	-	\$199.47			
Steve Newman	-	\$266.09			
Barbara Newman	-	\$266.06			
Richard Alan Newman -		\$266.06			
Evelyn E. Maxey	-	\$797.91			
Charles R. Tidd Estate -		\$2,394.03			
Barbara Tidd	-	\$1,197.00			

4 Faith Amariah Esqueda (GUARD/P)

Case No.11CEPR00602

Petitioner **Amalia Molly Dominguez (Pro Per – Maternal Grandmother – Petitioner)**

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

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 6/24/15</u></p> <p>1. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on:</p> <ul style="list-style-type: none"> - Ray Gomez (Maternal Grandfather) - Paternal Grandfather (not identified) - Paternal Grandmother (not identified) <p><u>Note:</u> Sam Esqueda, the father, signed Consent and waiver of notice on 6/24/15. Did Petitioner inquire about his parents at that time?</p>	
Cont. from 062415				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
		Reviewed by: skc		
		Reviewed on: 7/24/15		
		Updates: 7/28/15		
		Recommendation:		
		File 4 – Esqueda		

Third Amended First and Final Account and Report of Conservator; Petition for Allowance of fees to Attorney for Conservator and Conservator's Attorney and for Distribution of Estate

DOD: 2/20/15		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> In the future, the attorney should remember that final accounts should comply with Probate Code §2620(b) with a separate account period subsequent to the death of the Conservatee.</p> <p><u>Note:</u> A filing fee was not charged for this amended petition. (Fees were originally waived for this Conservatee on 5/14/12.) Therefore, reimbursement of \$435.00 will be deducted from the order.</p>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
✓	2620(c)			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 7/28/15	
			Updates:	
			Recommendation:	
			File 5 – Hopkins	

Attorney Horton, Lisa (for Petitioner Cynthia Jane Tosi, Guardian of the Estate)

Second and Final Account and Report of Guardian; petition for Its Settlement: for Allowance of Attorney Fees and Reimbursement of Costs Advanced; for Termination of Guardianship of the Estate; for Final Distribution and for Discharge of Guardian

		CYNTHIA JANE TOSI , mother and Guardian of the Estate, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Paragraph 9 of the <i>Petition</i> states Petitioner's attorney will accept the sum of \$2,200.00 rather than the \$2,500.00 flat fee pursuant to Local Rule 7.16(B)(4). However, the authorized flat fee is \$1,250.00 for each timely filed subsequent account, which describes the instant <i>Second Account</i>. Therefore, need itemized declaration in compliance with CA Rule of Court Rule 7.751(b) referring to Rule 7.702 in support of the attorney fee request.</p>
		<u>Account period: 9/11/2013 – 5/26/2015</u>	
Cont. from		Accounting - \$21,916.29	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$21,912.80	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$18,688.29 <i>(all cash)</i>	
<input checked="" type="checkbox"/>	Inventory	Guardian - waives	
<input type="checkbox"/>	PTC	Attorney - \$2,200.00 <i>(exceeds Local Rule 7.16)</i>	
<input type="checkbox"/>	Not.Cred.	Costs - \$435.00 <i>(filing fee)</i>	
<input checked="" type="checkbox"/>	Notice of Hrg	Bond - \$26,377.00 <i>(filed 8/6/2012)</i>	
<input checked="" type="checkbox"/>	Aff.Mail	Petitioner prays for an Order:	
<input type="checkbox"/>	Aff.Pub.	1. Approving, allowing and settling the Second and Final account and approving all acts and transactions of the Guardian as set forth in the account;	
<input type="checkbox"/>	Sp.Ntc.	2. Authorizing payment of the Attorney fees and reimbursement of costs;	
<input type="checkbox"/>	Pers.Serv.	3. Authorizing distribution of the remaining balance of the Guardianship estate account to TYLER JAMES DONDLINGER , who has reached age 18; and	
<input type="checkbox"/>	Conf. Screen	4. Discharging the Guardian of the estate and her bond upon the filing of a receipt from [Tyler] for all funds received and the filing of an Ex Parte Petition for Final Discharge and Order.	
<input type="checkbox"/>	Letters 080612		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	2620		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: LEG	
		Reviewed on: 7/27/15	
		Updates:	
		Recommendation:	
		File 6 – Dondlinger	

Attorney Gin, Robert W. (for Terri Denise Gill, Executor)
 Attorney Pape, Jeffrey B. (for Robert Hanggi, estranged spouse)

First and Final Account and Report of Administration, Petition for Settlement, for Allowance of Statutory Compensation to Executor and to Attorneys, and for Final Distribution

DOD: 4/14/2012	TERRY DENISE GILL , daughter and Executor, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. <i>Summary of Account</i> lists charges as \$158,079.10, while credits are listed as \$159,686.59, resulting in an unexplained difference of \$1,607.49, causing the accounting not to balance. Charges must equal credits as provided by Probate Code § 1061(c). Need clarification and/or amended account pursuant to Probate Code § 1060 et seq. 2. <i>Partial No. 1 Inventory and Appraisal</i> filed on 7/12/2013 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.) 3. Need itemization of costs requested for reimbursement as required by Local Rule 7.17(C) for the Court in its discretion to consider and approve reimbursement to attorney of allowable costs advanced. ~Please see additional page~
	Account period: 2/19/2013 – 4/29/2015	
Cont. from	Accounting - [\$158,079.19?]	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$137,079.10	
<input checked="" type="checkbox"/> Verified	Ending POH - \$113,058.83 (\$4,057.43 cash)	
<input checked="" type="checkbox"/> Inventory		
<input type="checkbox"/> PTC	X	
<input checked="" type="checkbox"/> Not.Cred.	Executor - [\$5,112.37] (statutory)	
<input checked="" type="checkbox"/> Notice of Hrg	Attorney - [\$5,112.37] (statutory)	
<input checked="" type="checkbox"/> Aff.Mail	W /	
<input type="checkbox"/> Aff.Pub.	Attorney XO - \$12,290.30 (per Declaration in Support of Request filed 7/29/2015 and itemization in Exhibit C; for obtaining family law attorney records related to Decedent's dissolution; for petition for a probate homestead over Decedent's residence owned by Decedent and Robert Hanggi, and settlement agreement preparation resulting in resolution of dispute; for obtaining survey of property for fence; for assistance with determining available well water on acreage; [un-totaled hours] @ attorney rates of \$225/hr and \$250/hr;)	
<input checked="" type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters	021913	
<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	Costs - \$1,347.42 (not itemized)	
<input type="checkbox"/> Aff. Posting	Closing - \$2,000.00	
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input checked="" type="checkbox"/> FTB Notice		
~Please see additional page~		
Reviewed by: LEG		
Reviewed on: 7/27/15		
Updates:		
Recommendation:		
File 7 – Hanggi		

Distribution pursuant to Decedent's Will and to Order Approving Settlement filed 4/29/2015 is to:

- **DARLENE HANGGI LIVING TRUST** – entire estate valued at [**\$88,762.49?**], consisting of **\$5,000.00** payment from estranged spouse **ROBERT HANGGI** to the Estate of Darlene Kaye Hanggi in settlement of the saddle dispute and other monetary issues; award to **ROBERT HANGGI** of a Probate Homestead in the community property interest which the Estate has in the residence with Robert responsible for repairs, maintenance, taxes and insurance of residence; relinquishment of **ROBERT HANGGI'S** license to use the road on the Decedent Darlene Hanggi's property; relinquishment of **ROBERT HANGGI'S** license to use a water pipeline crossing Decedent Darlene Hanggi's property; **ROBERT HANGGI** will at his sole expense install a new water meter as specified in **Order Approving Settlement filed 4/29/2015**, and Estate of Darlene Haggi will install a new water meter as specified in **Order Approving Settlement filed 4/29/2015**.

Petitioner prays for an Order:

5. Approving, allowing and settling the First and Final account;
6. Ratifying, confirming and approving all acts and transactions of the Petitioner relating to matters set forth in the account;
7. Authorizing payment of the Executor and Attorney fees and commissions and closing reserve;
8. Authorizing payment of the Extraordinary Attorney fees; and
9. Distributing the estate of the Decedent remaining in Petitioner's hands to the Trustee of the **DARLENE HANGGI LIVING TRUST**.

NEEDS/PROBLEMS/COMMENTS, continued:

4. *Schedule F Disbursements* shows payments from the estate made to the Attorney. Paragraph 18 of the *Petition* states the Executor on behalf of the Trustee of the DARLENE HANGGI LIVING TRUST has paid to the law firm the sum of \$3,453.62, which is credited against the costs of administration advanced and attorney's fees, leaving unpaid the sum of \$3,006.17, which should be allowed. CA Rule of Court 7.700 provides the personal representative must not pay and the attorney must not receive statutory fees or fees for extraordinary services in advance of a court order authorizing their payment, and the court may impose sanctions against the personal representative or attorney, and surcharge with interest from the date of payment, the personal representative for payment of the fees in advance of court order.
5. Paragraph 18 of the *Petition* states the attorneys will advance certification and recording fees for the Judgement of Final Distribution in an unknown sum at this time, all of which should be reimbursed from the reserved being requested. No closing reserve funds shall be used for attorney fees pursuant to Local Rule 7.12.6(D).
6. *Exhibit A, Computation of Statutory Compensation* does not account for the \$18,204.50 "loss on other disposition" described in Schedule G which were concluded to be the separate property of Decedent's spouse and thus not part of the Decedent's estate. Therefore, the statutory fee base should be \$118,874.60 and the fee calculates as \$4,566.24 rather than \$5,112.37.

~Please see additional page~

NEEDS/PROBLEMS/COMMENTS, continued:

7. Need Declaration of Trustee pursuant to Local Rule 7.12.5, which provides that if property in the estate is to be distributed to a pre-existing trust, the current trustee must file a declaration setting forth the name of the trust, its establishment date, and taxpayer identification number, verifying that the trust is in full force and effect, and that the trustee has an executed copy of the trust in possession. *(Note: Written Acceptance of Trust filed 6/29/2015 in compliance with Probate Code § 10694(b)(4) is distinct from the declaration required by Local Rule 7.12.5.)*
8. Need clarification regarding the source of payment for the attorney fees and cost reimbursement based upon statement in Paragraph 21 of the Petition stating that the sum of \$0.00 cash will remain in the estate less payments for commissions and fees, costs and closing reserve.
9. Need revised proposed order based upon the issues raised regarding incorrect calculations.

Petition for Final Distribution on Waiver of Accounting

DOD: 12/7/2013	THOMAS BRESSLER , Executor, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Continued to 9/2/15 at the request of the petitioner.
	Accounting is waived.	
Cont. from		<ol style="list-style-type: none"> Petition does not list the Creditor's Claim of Bank of America in the amount of \$6,630.96 filed on 4/25/14. California Rules of Court, Rule 7.403. Need Allowance or Rejection or Rejection of Creditor Claim of Bank of America. California Rules of Court, Rule 7.401. Petitioner indicates he made preliminary distributions of the 1,858 shares of PG&E common stock to the beneficiaries of the estate (620 shares to Thomas, 620 shares to Sally and 618 shares to Derek). Derek should receive an equal share or an offset from other assets of the estate. Need receipts from the beneficiaries for preliminary distributions of the PG&E common stock and personal property. Petition does not contain a statement regarding if notice to the Franchise Tax Board was performed, as required by Probate Code 9202(c)(1). Need property on hand schedule. California Rules of Court, Rule 7.651. Order does not comply with Local Rule 7.6.
<input type="checkbox"/> Aff.Sub.Wit.	I & A - \$206,733.74	
<input checked="" type="checkbox"/> Verified	POH - ???	
<input checked="" type="checkbox"/> Inventory	Executor - waives.	
<input checked="" type="checkbox"/> PTC		
<input checked="" type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Distribution, pursuant to Decedent's Will, is to:	
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.	Thomas Bressler - 1/3	
<input type="checkbox"/> Sp.Ntc.	Sally Bressler - 1/3	
<input checked="" type="checkbox"/> Pers.Serv. W/O	Derek Weibel - 1/3	
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 7/27/15
		Updates:
		Recommendation:
		File 8 – Bressler

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

		DEBORAH TITUS , Conservator, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Wednesday, August 26, 2015 at 9:00 a.m. in Department 303, for the filing of the receipt for blocked account. <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>
		Sale price - \$37,000.00	
		Overbid - 39,350.00	
Cont. from		Reappraisal - \$37,500.00 (50% interest)	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory	Property - 2340 E. Fresno Clay	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.	Publication - Business Journal	
<input checked="" type="checkbox"/>	Notice of Hrg	Buyers - Michael Huber, an unmarried man.	
<input checked="" type="checkbox"/>	Aff.Mail	W/	
<input checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.	Broker - \$1,665.00 (4.5% - payable to Wainwright & Associates)	
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters	Current bond is \$20,000.00	
<input type="checkbox"/>	Duties/Supp	All proceeds to be placed into a blocked account.	
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input checked="" type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 7/27/15
			Updates:
			Recommendation:
			File 9 – Dolby

Attorney

Cobb, Lee S.W. (for Rochelle Rosenbalm – Conservator – Petitioner)

Amended Petition for Substituted Judgment [Prob. Code §2580(a), (b)(6), (8), and (11)]

	See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Petitioner was appointed as Conservator of the Person and Estate on 12/8/14. No Inventory and Appraisal has yet been filed pursuant to Probate Code §2610, although Petitioner does identify conservatorship estate assets in this petition.</p> <p>If granted, the Court may require the filing of the Inventory and Appraisal and a first (and final) accounting of the conservatorship estate pursuant to Probate Code §2620 prior to transfer of assets and termination of the conservatorship estate pursuant to Probate Code §2630.</p> <p>If required, the Court will set status hearings as follows: - Wednesday, Sept. 2, 2015 for the filing of the Inventory and Appraisal - Wednesday, January 27, 2016 for the filing of the first and final accounting and termination of the conservatorship estate.</p> <p>Note: The proposed Order submitted 7/28/15 includes discharge of bond. The Court may require revision or interlineation to insert language regarding discharge upon proper account and filing of receipts as set forth in #1 above.</p> <p>Reviewed by: skc</p> <p>Reviewed on: 7/28/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 10 - Keehn</p>
<input type="checkbox"/>	Aff.Sub.Wit.	
<input checked="" type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input checked="" type="checkbox"/>	Notice of Hrg	
<input checked="" type="checkbox"/>	Aff.Mail	w
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input type="checkbox"/>	Pers.Serv.	
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input checked="" type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	

First and Final Account and Report of Personal Representative, Petition for Settlement, for Allowance of Commission and for Ordinary and Extraordinary Attorneys' Fees, Reimbursement of Costs, Reserve and for Final Distribution

DOD: 06/08/14		LAWRENCE BOLINGER , Executor, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. The Petition does not address notice to the CA Victims Compensation Board (Probate Code § 9202(b)).</p>
		Account period: 06/09/14 – 06/08/15	
		Accounting - \$702,862.66	
		Beginning POH - \$669,159.30	
		Ending POH - \$646,524.26 (\$103,524.26 is cash)	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	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	08/20/14	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202	x	
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
		<p>Executor (statutory) - \$17,057.26</p> <p>Attorney (statutory) - \$17,057.26</p> <p>Attorney x/o - \$3,610.00 (for the sale of real properties, completion of documents and claims forms, work regarding tax returns, dealing with tenants of one of the real properties)</p> <p>Costs - \$2,360.00 (filing fees, publication, certified copies, probate referee)</p> <p>Closing - \$3,000.00</p> <p>Distribution, pursuant to Decedent's will, is to:</p> <p>Samuel Levi Bolinger - ½ interest in real property located at 879 Fenmore Ave, Sanger, CA subject to the verbal agreement set forth in Paragraph Third of Decedent's Will</p> <p>Steven Michael Bolinger - ½ interest in real property located at 879 Fenmore Ave, Sanger, CA subject to the verbal agreement set forth in Paragraph Third of Decedent's Will</p> <p>Lawrence N. Bolinger, Trustee of the Testamentary Trust of Gary N. Bolinger for the benefit of Samuel Levi Bolinger and Steven Michael Bolinger - \$60,439.74 cash, real property located at 3880 E. Clay Ave, Fresno, real property located at 6546 E. Harvey, Fresno, plus a 2004 Chevy Tahoe</p>	
		Reviewed by: JF	
		Reviewed on: 07/27/15	
		Updates:	
		Recommendation:	
		File 11 – Bolinger	

Atty Petoyan, Marcus (for Laura Leonard – beneficiary/Petitioner)
 Atty Kruthers, Heather (for Public Administrator – successor trustee)

Probate Status Hearing RE: Account

DOD: 06/22/07	<p>LAURA LEONARD, step-daughter and beneficiary of the Trust, filed a PETITION FOR ORDER ACCEPTING RESIGNATION OF TRUSTEE AND FOR APPOINTMENT OF THE FRESNO COUNTY PUBLIC ADMINISTRATOR SUCCESSOR TRUSTEE on 07/02/14.</p> <p>On 08/25/14, the Petition was granted and the PUBLIC ADMINISTRATOR was appointed as Successor Trustee.</p> <p>Minute Order in related matter estate matter for Paul Harvey Wallace set this matter for a status hearing on 3/25/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>See pages 2A, 2B and 2C for related matter.</p> <p><u>CONTINUED FROM 06/24/15</u> Minute Order from 06/24/15 states: The Court allows preliminary distributions from the Trust.</p>
Cont. from 032515, 062415		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
<p>Reviewed by: JF</p>		
<p>Reviewed on: 07/27/15</p>		
<p>Updates:</p>		
<p>Recommendation:</p>		
<p>File 12 - Wallace</p>		

		<p>ALVIN MOULTRIE, Father, was appointed Guardian of the Estate without bond on 3/24/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Receipt and Acknowledgment of Order for the Deposit of Money into Blocked Account (MC-356).</p>
		<p>The Court originally ordered \$29,750.00 to be placed into a blocked account based on the file and set status hearing for the filing of the receipt for blocked account.</p>	
<p>Cont from 050615, 052715, 070115, 071515</p>		<p>At the hearing on 7/1/15, it was determined that the correct amount was \$20,002.62 and the Court signed a new blocking order.</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: 7/24/15</p>
			<p>Updates:</p>
			<p>Recommendation:</p>
			<p>File 13A - Moultrie</p>

13B 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.

	ALVIN MOULTRIE, Father, was appointed Guardian of the Estate without bond on 3/24/15.	NEEDS/PROBLEMS/COMMENTS: 1. 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.	
Cont. from 072115		
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		Reviewed by: skc
Status Rpt		Reviewed on: 7/24/15
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 13B – Moultrie

13B

	<p>ALVIN MOULTRIE, Father, was appointed Guardian of the Estate without bond on 3/24/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
<p>Cont from 050615, 052715, 070115, 071515</p>	<p>The Court originally ordered \$29,750.00 to be placed into a blocked account based on the file and set status hearing for the filing of the receipt for blocked account.</p>	<p>2. Need Receipt and Acknowledgment of Order for the Deposit of Money into Blocked Account (MC-356).</p>
<p>Aff.Sub.Wit.</p>		<p>Note: The EECU Verification of Deposit attached to the declaration does not confirm that the funds are deposited into a blocked guardianship estate account. The mandatory Judicial Council form MC-356 must be used for this purpose.</p>
<p>Verified</p>		<p>3. Petitioner's declaration appears to request a lump sum from both minors' accounts. A proper Petition for withdrawal of Funds from Blocked Account (Mandatory Judicial Council Form MC-357) must be appropriately filed in each minor's estate, with a proposed order thereon (MC-356), and the Court may require additional information or noticed hearing.</p>
<p>Inventory</p>	<p>At the hearing on 7/1/15, it was determined that the correct amount was \$20,002.62 and the Court signed a new blocking order.</p>	<p>Reviewed by: skc</p>
<p>PTC</p>		<p>Reviewed on: 7/24/15</p>
<p>Not.Cred.</p>		<p>Updates:</p>
<p>Notice of Hrg</p>	<p>Declaration filed 7/10/15 states Mr. Moultrie would like the Court to release \$10,000.00 to purchase a family vehicle for transportation for his children to and from school and doctor appointments, clothing and shoes, their own dressers, and a TV. These monies would help in many ways to help dispel from their memory the tragedy of their mother's murder. The children were present in the home they shared with their mother when this took place. He is trying to give them stability and a normal life. Their mother's death was traumatic and they are all just trying to live and heal from the devastation that her death caused.</p>	<p>Recommendation:</p>
<p>Aff.Mail</p>		<p>File 14A - Moultrie</p>
<p>Aff.Pub.</p>		
<p>Sp.Ntc.</p>		
<p>Pers.Serv.</p>		
<p>Conf. Screen</p>		
<p>Letters</p>		
<p>Duties/Supp</p>		
<p>Objections</p>		
<p>Video Receipt</p>		
<p>CI Report</p>		
<p>9202</p>		
<p>Order</p>		
<p>Aff. Posting</p>		
<p>Status Rpt</p>	<p>Attached to the declaration are printouts from EECU for each child reflecting that \$20,002.62 was deposited for Alveon and \$20,002.61 was deposited for Aniyah, both appear to be "joint" accounts with the guardian.</p>	
<p>UCCJEA</p>		
<p>Citation</p>		
<p>FTB Notice</p>		

		<p>ALVIN MOULTRIE, Father, was appointed Guardian of the Estate without bond on 3/24/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>2. Need Inventory and Appraisal per Probate Code §2610 or written status report per Local Rule 7.5.</p>
		<p>At the hearing on 3/24/15, the Court set this status hearing for the filing of the Inventory and Appraisal.</p>	
Cont from 072115			
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: 7/24/15
			Updates:
			Recommendation:
			File 14B - Moultrie

Petition for Termination of Proceedings and Discharge of Executor for Want of Assets Subject to Administration

DOD: 6/2/14		<p>DYLEN CAMPBELL, Executor, is petitioner.</p> <p>Petitioner states after the initiation of the probate proceedings and the appointment of Petitioner as Executor, Petitioner found that there is no property of any kind belonging to the estate and subject to administration. There is no longer any necessity for continuing the administration of the estate.</p> <p>Wherefore, Petitioner requests orders as follows:</p> <ol style="list-style-type: none"> Administration of the estate be immediately terminated for want of assets; Petitioner be discharged as the Executor of the estate. 	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
Cont. from 062415				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W/
	Aff.Pub.			
✓	Sp.Ntc.			W/
	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: 7/24/15	
			Updates:	
			Recommendation: SUBMITTED	
			File 15 - Campbell	

Status Re: Filing Receipt for Blocked Account

	SUSAN TURNER was appointed Administrator with full IAEA and without bond on 2/19/15.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. If the property sold for \$150,000 and had \$96,577 in encumbrances, it appears that the proceeds from the sale should be more than \$12,982.11. The court may require copies of the seller's closing statements.</p>
	Order for Probate indicates that the net proceeds from the sale of real property must be placed into a blocked account.	
Cont. from	Letters issued on 2/27/15.	
Aff.Sub.Wit.	Inventory and Appraisal, part 1 was filed on 4/17/15 showing a value of \$25,024.15.	
Verified	Inventory and Appraisal, part 2, final was filed on 4/17/15 showing the value of the real property at \$215,000.00.	
Inventory	Notice of Proposed Action filed on 5/21/15 indicated the real property was to be sold for \$150,000.00. The Petition for Probate indicated the real property had \$96,577.00 in encumbrances.	
PTC	Order to Deposit Money into Blocked Account Ordered \$12,982.11 to be deposited into a blocked account.	
Not.Cred.	Receipt for Blocked Account filed on 7/21/15 shows deposits of \$12,982.11.	
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: 7/29/15
		Updates:
		Recommendation:
		File 16 – Melville

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

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:	
Cont. from 062415				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			W
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
		Reviewed by: skc		
		Reviewed on: 6/18/15		
		Updates:		
		Recommendation:		
		File 17 - Sanchez		

Probate Status Hearing re: Inventory and Appraisal

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>OFF CALENDAR. Inventory and Appraisal filed on 7/17/15.</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: KT
		Reviewed on: 7/27/15
		Updates:
		Recommendation:
		File 18 – Taylor

Probate Status Hearing RE: Proof of Bond

DOD: 12/28/14	<p>DEBORAH A. HARPER, Spouse, was appointed Administrator with Full IAEA with bond of \$185,000.00 on 5/13/15.</p> <p>At the hearing on 5/13/15, the Court set this status hearing for the filing of bond.</p> <p>Letters have not yet issued.</p> <p>Declaration of Deborah Harper filed 7/8/15 states after submitting her bond application, she was informed that she did not qualify due to her credit, and was asked if anyone would co-sign the bond application with her. A co-signer was found, but due to the co-signer's credit, she still did not qualify for bond.</p> <p>Ms. Harper therefore requests the Court modify the order appointing her as administrator by:</p> <ul style="list-style-type: none"> i. Reducing her authority from Full to Limited authority; or ii. Granting full authority and requiring that any estate cash or sale proceeds be deposited into a blocked account. <p>With the above-listed adjustments to the order, she is confident that she can efficiently, timely and responsibly administer this relatively modest estate to the Court's satisfaction.</p> 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 6/24/15: Ms. Peck reports that her client did not qualify for bond and requests a reduction to limited authority and an order that the proceeds go into a blocked account. The Court orders Ms. Peck to file a verified declaration with regard to the requested alternatives and to properly notice all those entitled to notice. The Court revokes its previous orders and the issued Letters subject to reissuing on 7/29/15.</p> <ol style="list-style-type: none"> 1. Notice of Hearing was served <u>without</u> a copy of the declaration filed 7/8/15. Rather, a copy of the original petition was attached. Need clarification of whether notice of this request to waive bond was properly served. 2. The petition originally indicated \$10,000.00 in personal property with \$100.00 annual income and real property valued at \$174,000.00; therefore bond was fixed at \$185,000.00. <p>While amending to limited authority may alleviate the need for bond regarding the real property, bond may still be necessary for the personal property, the nature of which is unknown.</p> <p>The Court may require waivers of bond (DE-142) from the decedent's three adult children, or may require clarification regarding the nature of the personal property, and if cash, may require blocking.</p>
Cont. From: 062415		
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	<p>Reviewed by: skc</p>	
Status Rpt	<p>Reviewed on: 7/28/15</p>	
UCCJEA	<p>Updates:</p>	
Citation	<p>Recommendation:</p>	
FTB Notice	<p>File 19 - Harper</p>	

Age: 17	<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS:
	JOSE MENDEZ , brother-in-law, is Petitioner.	Petitioner is Spanish speaking.
	Father: CELEDONIO ESCOBAR	1. Need <i>Notice of Hearing</i> .
Cont. from	Mother: ISABEL RODAS	2. Need proof of service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for:
<input type="checkbox"/> Aff.Sub.Wit.	Mother: ISABEL RODAS	a. Celedonio Escobar (father) – <i>personal service required</i>
<input checked="" type="checkbox"/> Verified	Paternal grandfather: FLORENCIO MONTOY – <i>deceased</i>	b. Isabel Rodas (mother) – <i>personal service required</i>
<input type="checkbox"/> Inventory	Paternal grandmother: FRANCISCA ESCOBAR – <i>deceased</i>	c. Rosa Escobar Rodas (sister) – <i>service by mail sufficient</i>
<input type="checkbox"/> PTC	Maternal grandfather: BENJAMIN RODAS – <i>deceased</i>	
<input type="checkbox"/> Not.Cred.	Maternal grandmother: BERNARDINA ARGUETA – <i>deceased</i>	
<input type="checkbox"/> Notice of Hrg	Sibling: ROSA ESCOBAR RODAS (25)	
<input type="checkbox"/> Aff.Mail	Petitioner states: Benjamin is in immigration proceedings as an asylum applicant. His parents are in his home country of El Salvador and are unable to care for him in the U.S. Guardianship is necessary to help Benjamin stay in the U.S. with relatives due to the danger he faces in his home country.	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input 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	Court Investigator Charlotte Bien filed a report on 07/13/15.	
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 07/27/15
		Updates:
		Recommendation:
		File 21 – Rodas

Attorney LeVan, Nancy (for Petitioners Sharron Gomez and Sylvia Escobeda)

Petition for Appointment of Probate Conservator of the Estate

		NO TEMPORARY REQUESTED	<p>SHARRON GOMEZ, mother, is Petitioner and requests appointment of SHARRON GOMEZ and SYLVIA ESCOBEDA, cousin, as Co-Conservators of the Estate with bond set at an unspecified amount.</p> <p style="text-align: center;">~ Please See Petition for details~</p> <p>Court Investigator's Report was filed on 7/21/2015.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator Advised Rights on 7/16/2015.</p> <ol style="list-style-type: none"> Bond is required pursuant to Probate Code § 2320 and CA Rule of Court 7.207. <i>Petition</i> is incomplete at Item 1(c)(2) regarding amount of bond. Item 3(e) of the <i>Petition</i> states the estate consists of annual income from wages of the proposed Conservatee. Probate Code § 1871 and 2601 provide the conservatee retains the right to control wages from conservatee's employment, and the wages are not part of the estate for which conservator is accountable. <p style="text-align: center;">~Please see additional page~</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 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 type="checkbox"/>	UCCJEA			
<input checked="" type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			<p>Reviewed by: LEG</p> <p>Reviewed on: 7/27/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 22 - Detert</p>	

NEEDS/PROBLEMS/COMMENTS, continued:

3. Item 4(a) of the *Petition* states the proposed Conservatee is a patient in or on leave of absence from a state institution under the jurisdiction of the California Department of Mental Health or the California Department of Developmental Services, and lists CVRC as the institution, which does not appear to be supported by the information provided in the *Petition*.
4. Item 5(f) of the *Petition* is incomplete re developmentally disabled. However, the *Petition* indicates elsewhere that proposed Conservatee is client of CVRC. Need proof of mailed service of the *Notice of Hearing* with a copy of the *Petition for Appointment of Probate Conservator*, showing service was mailed at least 30 days before the hearing to Central Valley Regional Center (CVRC) as defined in § 1827.5, pursuant to Probate Code § 1822(e).
5. Need *Conservatorship Video Viewing Certificate* pursuant to Local Rule 7.15.9(A).

Spousal Property Petition

DOD: 4/18/1994	SALLY CAVITT , personal representative of FELIX LOPEZ , surviving spouse, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need copy of Letters showing the appointment of petitioner, Sally Cavitt as personal representative the estate of Felix Lopez. 2. Petition does not allege any facts for the court to determine that the property was community property and should pass to the surviving spouse.
	No other proceedings	
Cont. from	Decedent died intestate.	
<input type="checkbox"/> Aff.Sub.Wit.	Petitioner does not allege any facts for the court to determine that the property should pass to the surviving spouse.	
<input checked="" type="checkbox"/> Verified	Petitioner requests court confirmation that 50% interest in real property passes to the surviving spouse and 50% belongs to the surviving spouse.	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail W/		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 7/28/15
		Updates:
		Recommendation:
		File 23 – Lopez

Petition to Determine Succession to Real Property

DOD: 5/13/15	PHILLIP SHERWOOD , son, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need date of death of deceased spouse. Local Rule 7.1.1D.
	40 days since DOD.	
	No other proceedings.	
Cont. from	Decedent died intestate.	
<input type="checkbox"/> Aff.Sub.Wit.	I & A - \$125,000.00	
<input checked="" type="checkbox"/> Verified	Petitioner requests Court determination that Decedent's 100% interest in real property located in Fresno passes to him pursuant to intestate succession.	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail W/		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 7/28/15
		Updates:
		Recommendation:
		File 25 - Sherwood

26 Consepsion R. Jaurigue (CONS/PE) Case No. 15CEPR00637

Attorney Bagdasarian, Gary G. (for Corina Jaurigue – Petitioner – Granddaughter)

Attorney Horton, Lisa (Court Appointed for Proposed Conservatee)

Petition for Appointment of Probate Conservator of the Person & Estate

Age: 85		<p>CORINA JAURIGUE, granddaughter is petitioner.</p> <p style="text-align: center;"><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator Advised Rights on 07/13/2015.</p> <p>Voting Rights Affected Need Minute Order.</p> <p>1. Need Capacity Declaration. Note: A capacity declaration filed on 06/29/2015 was signed by physician's assistant and not a medical doctor.</p> <p>2. Need Video viewing receipt for each pursuant to Local Rule 7.15.8(A).</p> <p>3. Need proof of service at least fifteen (15) days before the hearing of the Notice of Hearing with a copy of the Petition for Appointment of Conservator for:</p> <ul style="list-style-type: none"> • Antonio Jaurigue • Enrique Jaurigue • Ana Moreno <p>4. Petition indicates the proposed conservatee receives Social Security in the amount of \$923 a month, \$11,076.00 yearly. If the proposed conservatee is only receiving Social Security there is no need to establish a conservatorship of the estate as the petitioner can become the proposed conservatee's payee. A conservatorship of the estate would require the conservators to file accountings.</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. w/		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt x		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input checked="" type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
Reviewed by: LV			
Reviewed on: 07/28/2015			
Updates:			
Recommendation:			
File 26 – Jaurigue			

Age: 10	<u>GENERAL HEARING 09/14/2015</u>	NEEDS/PROBLEMS/COMMENTS:
	GUADALUPE GUTIERREZ , non-relative, is petitioner.	1. Petition is incomplete. Petitioner does not provide a reason why temporary guardianship is in the best interest of the minor.
	<u>Please see petition for details</u>	Note: General Petition is also incomplete and does not provide a reason as to why guardianship is in the best interest of the minor.
Cont. from		2. Need Notice of Hearing.
<input type="checkbox"/> Aff.Sub.Wit.		3. 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:
<input checked="" type="checkbox"/> Verified		<ul style="list-style-type: none"> • Matthew G. Messick (Father) • Tiffany L. Crowder (Mother)
<input type="checkbox"/> Inventory		4. Page #5 of the Guardianship Petition – Child Information Attachment (GC 210(CA)) which pertains to whether the child has Native American Ancestry was not completed. Need declaration with page #5 attached.
<input type="checkbox"/> PTC		5. UCCJEA is incomplete. Need minor's residence information for the past 5 years
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	x	
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	x	
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LV
		Reviewed on: 07/28/2015
		Updates:
		Recommendation:
		File 27 – Messick

Age: 18	<u>TEMPORARY GRANTED EX PARTE:</u>	NEEDS/PROBLEMS/COMMENTS:
	<u>GENERAL HEARING: 09/21/15</u>	
	JUAN ALBERTO GARCIA AGUIRRE , uncle, is Petitioner.	
Cont. from	Father: MANUEL GARCIA – Consent & Waiver of Notice filed 07/20/15	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Mother: ELISELA AGUIRRE – Consent & Waiver of Notice filed 07/20/15	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Paternal grandparents: NOT LISTED	
<input type="checkbox"/> Notice of Hrg	n/a Maternal grandparents: NOT LISTED	
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.	Petitioner states: Juan fled Mexico to escape violence by gang members who threatened him at his workplace and on the streets of his town on numerous occasions. Temporary guardianship is necessary so that Juan can qualify for Special Immigration Juvenile Status before he turns 18.	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	n/a	
<input checked="" 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 checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 07/28/15
		Updates:
		Recommendation:
		File 28 – Aguirre