

**1 Janet Ruth Hartley (Estate)**

Case No. 10CEPR00428

Atty Kruthers, Heather H (for Public Administrator – Petitioner)  
 Atty Sanoian, Joanne (for Melody McCombs – Daughter)

**Amended First and Final Account and Report of Administrator and  
 Petition for Allowance of Ordinary and Extraordinary Commissions  
 and Fees and for Distribution [Prob. C. 9202, 10800, 10810, 10951,  
 11600, 11850(a)]**

<b>DOD: 3/30/10</b>		<b>PUBLIC ADMINISTRATOR</b> , Administrator, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Account period: 8/18/10 – 3/26/12	<b><u>OFF CALENDAR</u></b>
<b>Cont. from 051412, 062512</b>		Accounting - <b>\$188,300.00</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Beginning POH - <b>\$188,300.00</b>	<b>Amended petition filed 7-27-12 is set for hearing 9-4-12.</b>
<input checked="" type="checkbox"/>	<b>Verified</b>	Ending POH - <b>\$132,879.51</b>	
<input checked="" type="checkbox"/>	<b>Inventory</b>	Administrator - <b>\$6,319.00</b>	
<input checked="" type="checkbox"/>	<b>PTC</b>	(statutory)	
<input type="checkbox"/>	<b>Not.Cred.</b>	Administrator X/O - <b>\$3,248.00</b> (per Local Rule for sale of real property, sale of personal property and preparation of taxes)	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Attorney - <b>\$6,319.00</b>	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> W/	(statutory, payable \$3,819.00 to County Counsel and \$2,500.00 to Susan Moore.)	
<input type="checkbox"/>	<b>Aff.Pub.</b>	Bond fee - <b>\$588.44</b> (o.k.)	
<input checked="" type="checkbox"/>	<b>Sp.Ntc.</b> W/	Court fees - <b>\$204.00</b> (certified copies)	
<input type="checkbox"/>	<b>Pers.Serv.</b>	Closing - <b>\$1,000.00</b>	
<input type="checkbox"/>	<b>Conf. Screen</b>	<b>Distribution, pursuant to intestate succession, is to:</b>	
<input checked="" type="checkbox"/>	<b>Letters</b> 8/25/10	Robert Hartley - \$38,400.35	
<input type="checkbox"/>	<b>Duties/Supp</b>	David Guy - \$25,600.24	
<input type="checkbox"/>	<b>Objections</b>	Robert Guy - \$25,600.24	
<input type="checkbox"/>	<b>Video Receipt</b>	Melody McCombs - \$25,600.24	
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" 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 checked="" type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> KT / skc
			<b>Reviewed on:</b> 7-23-12
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 1 – Hartley</b>



**Probate Status Hearing Re: Filing of Inventory and Appraisal**

<b>Age: 75</b>	<b>BRUCE BICKEL</b> was appointed Conservator of the Estate on 3-29-12 with additional powers under Probate Code §2591 pursuant to the order.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>DOB: 7-17-37</b>		
		<b>Note: Kate Singh (niece) and Hubert Mitchell (brother) were appointed Co-Conservators of the Person on 3-29-12. Bruce Bickel was appointed Conservator of the Estate.</b>
	<b>Inventory and Appraisal Partial #1</b> was filed on 3-28-12 reflecting \$1,500,000.00 in real property in Los Angeles.	<b>Note: The real property was sold pursuant to court-confirmation and increased bond was filed.</b>
<b>Aff.Sub.Wit.</b>	<b>Current bond is \$966,000.00</b> (increased after sale of real property pursuant to Minute Order 3-29-12).	<b>1. Need Final Inventory and Appraisal.</b>
<b>Verified</b>		
<b>Inventory</b>	<b>At the hearing on 3-29-12</b> , the Court set this status hearing for filing of the Final Inventory and Appraisal.	
<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>Reviewed by: skc</b>
<b>Objections</b>		<b>Reviewed on: 7-23-12</b>
<b>Video Receipt</b>		<b>Updates:</b>
<b>CI Report</b>		<b>Recommendation:</b>
<b>9202</b>		<b>File 3 - Mitchell</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 Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)**

<b>DOD: 05/23/2012</b>		<p><b>STEVEN ROHDE</b>, son/ named co-executor and <b>SUE ELLEN ROHDE</b> former wife / named co-executor without bond, are petitioners.</p> <p>Full IAEA – o.k.</p> <p>Will dated: 05/21/2012</p> <p>Residence: Fresno Publication: The Business Journal</p> <p><b>Estimated value of the estate:</b></p> <table> <tr> <td>Personal property</td> <td>-</td> <td>\$1,000.00</td> </tr> <tr> <td>Real property</td> <td>-</td> <td>\$185,000.00</td> </tr> <tr> <td>Less Encumbrances</td> <td></td> <td><u>(-\$94,000.00)</u></td> </tr> <tr> <td><b>Total -</b></td> <td></td> <td><b>\$92,000.00</b></td> </tr> </table> <p>Probate Referee: Rick Smith</p>	Personal property	-	\$1,000.00	Real property	-	\$185,000.00	Less Encumbrances		<u>(-\$94,000.00)</u>	<b>Total -</b>		<b>\$92,000.00</b>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need original will to be deposited with the Court pursuant to Probate Code §8200(a)(1).</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>• <b>Friday, 01/11/2013 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <b>and</b></li> <li>• <b>Friday, 10/04/2013 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>
Personal property	-		\$1,000.00												
Real property	-		\$185,000.00												
Less Encumbrances			<u>(-\$94,000.00)</u>												
<b>Total -</b>			<b>\$92,000.00</b>												
<b>Cont. from</b>															
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		s/p												
<input checked="" type="checkbox"/>	<b>Verified</b>														
<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>														
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>		W												
<input checked="" 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 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>														
<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> 07/24/2012													
		<b>Updates:</b>													
		<b>Recommendation:</b>													
		<b>File 4 - Rohde</b>													

<b>DOD: 05/30/2012</b>		<p><b>SHIRLEY FRAMSTED and KERI LYNN EDMUNDS</b>, daughters, are petitioners.</p> <p>40 days since DOD</p> <p>No other proceedings</p> <p>I&amp;A – <b>\$126,818.35</b></p> <p>Decedent died intestate.</p> <p>Petitioners request Court determination that decedent's 100% interest in real property, located at 679 W. Sample Ave. Fresno, Ca. 93704, bank accounts, household furniture and furnishings pass to Shirley Framsted and Keri Lynn Edmunds, pursuant to intestate succession.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" 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>		
<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 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>		
		<p><b>Reviewed by:</b> KT / LV</p> <p><b>Reviewed on:</b> 07/24/2012</p> <p><b>Updates:</b> 07/27/2012</p> <p><b>Recommendation:</b> Submitted</p> <p><b>File 5 - Hartwig</b></p>	

<b>DOD: 1-7-11</b>		<p><b>RANDY HAWKINS</b>, Son, was appointed Administrator with Full IAEA without bond on 10-24-11.</p> <p>On 10-24-11, the Court set status hearing for filing of the Inventory and Appraisal on 1-30-12.</p> <p>On 1-30-12, the Administrator appeared and informed the Court that the inventory and appraisal was given to him today by his paralegal. The Court directed him to file the inventory and appraisal with the Clerk's Office forthwith and continued the matter to 7-30-12.</p> <p>As of 7-20-12, nothing further has been filed.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Continued from 1-30-12</u></p> <p><u>Minute Order 1-30-12:</u> The Petitioner informs the Court that the inventory and appraisal was given to him today by his paralegal. The Court directs the Petitioner to file the inventory and appraisal with the Clerk's Office forthwith. Matter continued to 7-30-12.</p> <p><u>As of 7-20-12, nothing further has been filed.</u></p> <p>1. Need Inventory and Appraisal.</p> <p><u>Note:</u> Administrator's original petition stated the estate contains real property with an estimated value of \$62,550.00.</p> <p><u>Note:</u> A status hearing for the filing of the first account or petition for final distribution is currently set for 10-29-12.</p>
<b>Cont. from 013012</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>	X		
<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>	X		
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
		<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 7-20-12</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 6 - Hawkins</b></p>	

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

Age: 7 months DOB: 07/27/11	<p align="center"><b><u>TEMPORARY EXPIRES 07/30/12</u></b></p> <p><b>VIOLETA ALCANTAR</b>, maternal grandmother, is Petitioner.</p> <p>Father: <b>CHRISTIAN LOPEZ</b></p> <p>Mother: <b>FLOR VIOLETA SERRATOS</b> – consent and waiver of notice filed 02/01/12</p> <p>Paternal grandfather: <b>JOE LOPEZ</b> – served by mail 01/27/12</p> <p>Paternal grandmother: <b>TERESA LOPEZ</b> – served by mail 01/27/12</p> <p>Maternal grandfather: <b>RIGOBERTO SERRATOS</b> – served by mail 01/27/12</p> <p>Petitioner states that the mother is only 16 and is not exhibiting the maturity necessary to properly care for her son. Petitioner states that she has been the primary care provider and has supported the baby since birth. Petitioner states that the mother has threatened to run away and take the baby with her. Petitioner states that the father is 18 and currently on probation for burglary. Father has a history of substance abuse and arrest and is not able to properly care for the child.</p> <p><b>Court Investigator Julie Negrete's report was filed 02/14/12.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 02/29/12</b> Minute Order from 02/29/12 states: The Court on its own motion grants a temporary guardianship of the person in favor of Violeta Alcantar. The temporary expires on 07/30/12. Matter is continued to 07/30/12. The Court directs that the father be present on 07/30/12.</p> <p>As of 07/23/12, the following problems remain:</p> <ol style="list-style-type: none"> <li>1. Need proof of personal service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person <u>or</u> Consent and Waiver of Notice <u>or</u> Declaration of Due Diligence for: - Christian Lopez (father)</li> </ol>	
Cont. from 022912			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			x
✓ 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> JF</p> <p><b>Reviewed on:</b> 07/23/12</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 7 - Lopez</b></p>			

**8 Cesar Gomez, Dassy Madrigal, Ashley Zaragoza & Jorge Zaragoza (GUARD/P)**  
**Case No 12CEPR00155**

Pro Per Zaragoza Gomez, Maria De Jesus (Guardian, maternal aunt)  
 Pro Per Vasquez, Jorge Luis Lopez (Pro Per Objector, Jorge's father)

**Status Hearing Re: Visitation**

<b>Cesar age: 16 years</b>	<p><b>MARIA De JESUS ZARAGOZA GOMEZ</b>, maternal aunt, was appointed Guardian on 4/16/2012.</p> <p><b>Minute Order dated 4/16/2012 [Judge Nunez] set this status hearing regarding visitation, and states:</b></p> <ul style="list-style-type: none"> <li>• Ramona Trevino is sworn and interprets for both parties;</li> <li>• The Court finds substantial compliance with the notice requirements and grants the <i>Petition</i>;</li> <li>• The Court orders visitation between father, Jorge Luis Lopez Vasquez, and the minor child Jorge as follows: beginning this Sunday, 4/22/2012, and for the next six weeks, father will pick up the child on Sunday no later than 12:00 noon and return him to the Guardian no later than 12:00 noon on Tuesday. Upon the seventh week and for the next eight weeks thereafter, visitation will remain the same with the exception that father will return the child to the Guardian no later than 12:00 noon on Wednesday;</li> <li>• The Court further orders that the father may take the child to the doctor if necessary while the child is in his care.</li> </ul>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Dassy age: 14 yrs</b>		
<b>Ashley age: 5 years</b>		
<b>Jorge age: 2 years</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: LEG</b>
		<b>Reviewed on: 7/23/12</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 8 – Gomez, Madrigal &amp; Zaragoza</b>



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

<b>DOD:10/11/2010</b>		<b>KARLA DEAN</b> , daughter is Petitioner and requests appointment as administrator without bond.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Notice of Petition to Administer Estate.  2. Need proof of service of Notice of Petition to Administer Estate on the following: <ul style="list-style-type: none"> <li>• Karla Leanne Dean</li> <li>• Roger Curtis Dean</li> <li>• Julia Maggie Dean</li> <li>• Holly Jo Johnson</li> <li>• Hannah Rose Johnson</li> <li>• Mary Ribicka Johnson</li> </ul> 3. Item 5B of the Petition is incomplete regarding stepchild or foster child.  4. Attachment 3(d) to Petition states every beneficiary requests bond be waived. Need signed waivers of bond from all beneficiaries. <ul style="list-style-type: none"> <li>• Karla Leanne Dean</li> <li>• Roger Curtis Dean</li> <li>• Holly Jo Johnson</li> <li>• Hannah Rose Johnson</li> <li>• Mary Ribicka Johnson</li> </ul>	
<b>Cont. from 062812</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			Full IAEA – o.k.
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			Decedent died intestate
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			W
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>			Residence: Tollhouse Publication: The Business Journal
<input checked="" 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>	<b>Estimated value of the Estate:</b> Personal Property - \$150.00 Real Property - \$105,000.00 <b>Total: - \$105,150.00</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>	Probate Referee: Rick Smith		
<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>Note: If the petition is granted status hearings will be set as follows:</b> <ul style="list-style-type: none"> <li>• <b>Friday, 01/11/2013 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <b>and</b></li> <li>• <b>Friday, 10/04/2013 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.</li> </ul> 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.				
<b>Reviewed by:</b> KT / LV				
<b>Reviewed on:</b> 07/24/2012				
<b>Updates:</b>				
<b>Recommendation:</b>				
<b>File 10 - Johnson</b>				

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

<b>Age: 7</b>		<p style="text-align: center;"><b>TEMPORARY EXPIRES 7-30-12</b></p> <p><b>WENDY DEL CARMEN TABORA</b>, sister, is petitioner.</p> <p>Father: <b>RUBEN GONZALEZ</b> – consents and waives notice.</p> <p>Mother: <b>ENRIQUETA BAQUEDANO</b> – consents and waives notice.</p> <p>Paternal grandparents: Not listed Maternal grandparents: Not listed (Child Information Attachment to Petition was not provided.)</p> <p><b>Petitioner states</b> the mother has immigration issues. Mother's permit to stay in the United States expired in March 2012.</p> <p><b>Court Investigator Jennifer Daniel filed a report on 7-20-12.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need Child Information Attachment. (This attachment includes a place to lists the names and addresses of the relatives and other necessary information.)</li> <li>2. Need Notice of Hearing and proof of service of Notice of Hearing at least 15 days prior to the hearing or consent and waiver of notice or declarations of due diligence on: <ul style="list-style-type: none"> <li>- Paternal Grandfather</li> <li>- Paternal Grandmother</li> <li>- Maternal Grandfather</li> <li>- Maternal Grandmother</li> </ul> </li> </ol>	
<b>DOB: 1-2-05</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input type="checkbox"/>	<b>Notice of Hrg</b>			x
<input type="checkbox"/>	<b>Aff.Mail</b>			x
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
N/A	<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 checked="" type="checkbox"/>	<b>CI Report</b>			
<input checked="" type="checkbox"/>	<b>Clearances</b>			
<input checked="" type="checkbox"/>	<b>Order</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>			
		<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 7-23-12</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 11 – Gonzalez</b></p>		



Age: 1 year	TEMPORARY EXPIRES 7-30-12	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Court Investigator to file report, clearances.</u></p> <ol style="list-style-type: none"> <li>1. Notice to the mother was dispensed pursuant to Minute Order 6-14-12 unless her whereabouts become known. The Court may require updated information at this time, if any.</li> <li>2. At the hearing on 6-14-12, this general hearing was rescheduled from 7-31-12 to 7-30-12. However, the Notice of Hearing filed 6-6-12 indicates that the maternal grandfather James May and maternal half-sister Makayla Camberos were served regarding the 7-31-12 date. The Court may require continuance for amended service.</li> </ol>
DOB: 9-1-10	RICHARD and JEANNIE ESPINOSA, paternal grandparents are petitioners.	
Cont. from	Father: LORENZO FRANCISCO ESPINOSA, consents and waives notice.	
Aff.Sub.Wit.		
✓ Verified		
Inventory	Mother: JODY SUZANNE MAY - Notice dispensed per Minute Order 6-14-12	
PTC		
Not.Cred.	Maternal grandfather: James May - Served by mail 6-5-12 for hearing date 7-31-12	
✓ Notice of Hrg		
✓ Aff.Mail	Maternal grandmother: Gail May, Deceased	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	Maternal Half-Sister: Makayla Camberos - Served by mail 6-5-12 for hearing date 7-31-12	
✓ Conf. Screen		
✓ Letters	<b>Petitioner alleges:</b> both parents have history of substance abuse and struggle with sobriety. 04/14/2012 police were called to the Mother's home, she fled with a friend leaving the child behind. Petitioners believe that the Mother feared being arrested. The Mother never returned, police called CPS and the child was placed in Petitioners' care. Petitioners were advised to seek guardianship as soon as possible. The Father was recently released from Fresno County Jail and is currently in a substance abuse program. Petitioners believe that the Mother was recently arrested and is out on bail.	
✓ Duties/Supp		
Objections		
Video Receipt		
✓ CI Report		
✓ Clearances		
✓ Order		
Aff. Posting		
Status Rpt		
✓ UCCJEA		
Citation		
FTB Notice	<b>Court Investigator Jennifer Daniel filed a report on 7-23-12.</b>	
		Reviewed by: skc
		Reviewed on: 7-23-12
		Updates: 7-24-12
		Recommendation:
		File 13 - Espinosa



Atty Simonian, Jeffrey D., of Penner Bradley & Simonian (for Petitioner Scott A. Smith)

Petition for Appointment of Successor Trustee (Probate Code 15660, 17200)

<b>DOD: 2/27/2012</b>	<b>SCOTT ANDREW SMITH</b> , Trust Beneficiary, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>Petitioner requests</b> the Court appoint a Successor Trustee for the <b>BRENTON ROBERT SMITH CHARITABLE REMAINDER UNITRUST dated 7/9/2005</b> , based upon the following:	1. Need proof mailed service of 30 days' notice prior to hearing pursuant to Probate Code § 17203 for the Attorney General, if the charitable trust is subject to Attorney General jurisdiction. - <b>Waiver of Notice by the Attorney General was filed 7-27-12.</b>
<b>Cont. from</b>	<ul style="list-style-type: none"> <li>• <b>BRENTON ROBERT SMITH</b>, as Donor and Trustee, executed the Trust on 7/9/2005 (copy attached as Exhibit A); at the time of his death (copy of certificate of death attached as Exhibit B), the Trustee was a resident of Fresno County, CA;</li> <li>• The Trust provides that if Brenton Robert Smith ceases to serve as Trustee, then <b>DIXON ROBERT SMITH</b> is to serve as Successor Trustee of the Trust; because Dixon Robert Smith is a minor, he lacks capacity and is not qualified to serve as the Trustee of the Trust, and therefore a vacancy exists in the office of Successor Trustee;</li> <li>• The Trust provides that Brenton Robert Smith was the sole beneficiary ("Unitrust Recipient") during his lifetime, entitled to distributions of Trust income and/or principal and was entitled to receive annual distributions from the Trust equal to 5% of the net fair market value of the Trust assets valued as of the first day of each taxable year, payable quarterly;</li> <li>• In accordance with the Trust terms, upon the death of Brenton Robert Smith, Petitioner <b>SCOTT ANDREW SMITH</b> became the sole beneficiary ("Unitrust Recipient") of the Trust, entitled to distributions of Trust income and/or principal and was entitled to receive annual distributions from the Trust equal to 5% of the net fair market value of the Trust assets valued as of the first day of each taxable year, payable quarterly for the remainder of his lifetime;</li> <li>• After the death of Petitioner, the Trust provides that the balance of the assets held by the Trust are to be distributed to <b>CENTRAL VALLEY MEDICAL SCHOLARSHIP FUND, INC.</b>, a California non-profit public benefit corporation ("Charitable Remainder Beneficiary");  <b>~Please see additional page~</b></li> </ul>	2. Probate Code § 15602(a)(3) provides a trustee is not required to give a bond unless an individual who is not named as trustee in the trust instrument is appointed as trustee by the court. Subdivision (b) provides a request by all adult beneficiaries of a trust that bond be waived is deemed to constitute a compelling circumstance sufficient for the court to excuse requirement of bond. Need waiver of bond requesting Lisa Lepper be appointed to serve without bond from Central Valley Medical Scholarship Fund, Inc., listed in the <i>Petition</i> as "Charitable Remainder Beneficiary," C/O Linda L. Smith (spouse of Brenton Robert Smith, the initial Trustee.)
<input type="checkbox"/> Aff.Sub.W		
<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"/> Waiver of Bond	X	
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/S		
<input type="checkbox"/> Objection		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Post		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		<b>Reviewed by:</b> LEG
		<b>Reviewed on:</b> 7/23/12
		<b>Updates:</b> 7/24/12
		<b>Recommendation:</b>
		<b>File 15 - Smith</b>

**Petitioner states, continued:**

- Petitioner being the current beneficiary and an interested person in the Trust requests pursuant to Probate Code § 15660 that the Court appoint a successor trustee for the Trust because the named successor is a minor and unable to act, there is no other practical method for appointing a successor trustee, and the Trust does not name another successor trustee in the event of a vacancy in the office of trustee for the Trust;
- There has been no agreement between the beneficiaries of the Trust to provide a successor trustee in accordance with Probate Code § 15660(c), and the size of the Trust estate makes it uneconomical to fill the vacancy in the office of trustee with a trust company;
- In accordance with Probate Code § 15660(d), Petitioner nominates **LISA LEPPER** to act as successor trustee of the Trust to fill the vacancy; Lisa Lepper is a private fiduciary licensed in California, qualified to act as successor trustee, and is not a related or subordinate party of the Donor of the Trust beneficiaries; Petitioner believes her appointment is in the best interest of the Trust and beneficiaries;
- Lisa Lepper has consented to serve as Successor Trustee of the Trust subject to an order of this Court confirming her appointment as Successor Trustee (*copy of Consent to Act attached as Exhibit C; original filed with Court on 6/14/2012*); Lisa Lepper has agreed to compensation for the performance of fiduciary services for the Trust on a flat fee basis in the amount of **\$1,200.00** per annum in addition to an initial setup charge of **\$250.00** for establishing accounts in the name of the Trust;
- Based on information available to Petitioner, the assets of the Trust consist of cash in the sum of **\$191,300.18 cash** (*see Exhibit D*);
- The Trust is silent on the requirement of bond for the person acting a Trustee; Petitioner believes that no bond is required to protect the interests of the Trust beneficiaries following appointment of Lisa Lepper as Successor Trustee.

**Petitioner prays for an Order:**

1. Appointing Lisa Lepper to act as [Successor] Trustee of the Trust and vesting in her all the powers held by Brenton Robert Smith, the initial Trustee of the Trust;
2. Directing the transfer, assignment, and delivery of all assets of the Trust held in the name of Brenton Robert Smith, the initial Trustee, to Lisa Lepper as Successor Trustee of the Trust; and
3. Waiving the requirement that Lisa Lepper give a bond for the performance of her fiduciary duties as [Successor] Trustee of the Trust.