



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.

Final Account and Report and Petition for Final Distribution

| | | | |
|-------------------------------------|----------------------|---|---|
| DOD: 10-11-10 | | <p>KARLA DEAN, Administrator with Limited IAEA without bond, is Petitioner.</p> <p>Accounting is waived - <u>Missing waivers</u></p> <p>I&A: \$65,150.00 POH: \$65,150.00 (real property, clothing)</p> <p>Administrator: Waived</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 4-30-13, 6-18-13</u></p> <p>SEE PAGE 1B</p> <p>Minute Order 4-30-13: No appearances. Matter continued to 6-18-13. The Court orders Karla Dean to be personally present on 6-18-13. The Court directs that a copy of the Examiner Notes be sent to Karla Dean. (Minute Order and Examiner Notes mailed 5-3-13.)</p> <p>Minute Order 6-18-13 (Karla Dean no appearing): The Court on its own motion removes Karla Dean as the administrator and appoints the Public Administrator as the personal representative. The Court sets the matter for an Order to Show Cause on 7/30/13 regarding Karla Dean's failure to appear and imposition of sanctions in the amount of \$500.00. The Court orders Karla Dean to be personally present on 7/30/13. Julia Dean provides contact information to the Court. Continued to 7/30/13 @ 9:00 a.m. Dept. 303. Set on 7/30/13 @ 9:00 a.m. Dept. 303 for: Order to Show Cause Re: Failure to Appear; Imposition of Sanctions in the Amount of \$500.00</p> <p>Note: Letters issued to Public Administrator on 7-8-13.</p> <p>SEE PAGE 1B: ORDER TO SHOW CAUSE</p> <p><u>See Need/problems/comments on Page 2 for issues with this petition filed by Ms. Dean.</u></p> |
| Cont from 043013, 061813 | | | |
| <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/o | | |
| <input type="checkbox"/> | Aff.Pub. | | |
| <input type="checkbox"/> | Sp.Ntc. | <p>Distribution pursuant to intestate succession and Assignments of Interest:</p> <p>Karla Dean: 1/3 share Roger Curtis Dean: 1/3 share Julia Maggie Dean: 1/3 share</p> | |
| <input type="checkbox"/> | Pers.Serv. | | |
| <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 checked="" type="checkbox"/> | 9202 | | |
| <input checked="" type="checkbox"/> | Order | | |
| <input type="checkbox"/> | Aff. Posting | | |
| <input type="checkbox"/> | Status Rpt | | |
| <input type="checkbox"/> | UCCJEA | | |
| <input type="checkbox"/> | Citation | | |
| <input type="checkbox"/> | FTB Notice X | | |
| | | <p>Reviewed by: skc</p> <p>Reviewed on: 7-25-13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1A – Johnson</p> | |

NEEDS/PROBLEMS/COMMENTS:

1. Need proof of service of notice of administration to California Franchise Tax Board pursuant to Probate Code §9202(c). (*Continuance for notice and time for response will be necessary.*)

Note: It appears that Petitioner believes notice was not required because of the value of the assets; however, notice is always required per §9202(c).

2. Need clarification: Intestate heirs Holly, Hanna and Mary filed Assignments of Interest in the estate to Karla, Julia and Roger; however, the petition does not reference these assignments and indicates equal distribution to all six heirs of a 1/6 interest each.

Note: The proposed order distributes the estate in 1/3 shares to Karla, Julia and Roger, which matches the assignments; however, this does not match the petition. Therefore, need clarification.

3. Need Waiver of Account from Roger.
4. Need written consent of all distributees (Karla, Julia and Roger) for distribution of real property in undivided interests pursuant to Local Rule 7.12.4.
5. This estate was opened with a fee waiver. At this time, assets are requested to be distributed. Therefore, the filing fees of \$830 for the initial petition and this final petition are due:

\$395 (Petition filed 5-17-12)
\$435 (Petition filed 3-25-13)
\$830 TOTAL

Order to Show Cause Re: Failure to Appear; Imposition of Sanctions in the Amount of \$500.00

| | | |
|----------------------|---|---------------------------------|
| | KARLA DEAN was appointed as Administrator with Limited IAEA without bond on 10-22-12. | NEEDS/PROBLEMS/COMMENTS: |
| | I&A filed 8-30-12 indicated a total estate value of \$65,150.00. | |
| Aff.Sub.Wit. | | |
| Verified | Ms. Dean filed a Final Account and Report and Petition for Final Distribution on 3-25-13. | |
| Inventory | | |
| PTC | | |
| Not.Cred. | Examiner Notes indicated numerous issues with the petition. See Page 1A. | |
| Notice of Hrg | | |
| Aff.Mail | At hearing on 4-30-13, there were no appearances. The Court continued the matter to 6-18-13 and ordered Ms. Dean to be personally present. The minute order and Examiner Notes were mailed to Ms. Dean on 5-3-13. | |
| Aff.Pub. | | |
| Sp.Ntc. | | |
| Pers.Serv. | | |
| Conf. Screen | | |
| Letters | At continued hearing on 6-18-13, Ms. Dean did not appear. The Court removed Ms. Dean and appointed the Public Administrator. The Court set this Order to Show Cause regarding Ms. Dean's failure to appear and imposition of sanctions in the amount of \$500.00. Ms. Dean is ordered to be personally present. | |
| Duties/Supp | | |
| Objections | | |
| Video Receipt | | |
| CI Report | | |
| 9202 | | |
| Order | The minute order and Order to Show Cause were mailed to Ms. Dean on 6-18-13. | |
| Aff. Posting | | |
| Status Rpt | | |
| UCCJEA | | |
| Citation | | |
| FTB Notice | | |
| | | Reviewed by: skc |
| | | Reviewed on: 7-25-13 |
| | | Updates: |
| | | Recommendation: |
| | | File 1B – Johnson |

2 Margarito Gonzalez (Estate)

Case No. 12CEPR00747

Atty Roberts, Gregory J. (for Annette Gonzalez Costa – daughter/Petitioner)

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

| | | | |
|--|---------------------------------------|---|---|
| DOD: 06/25/11 | | <p>ANNETTE GONZALEZ COSTA, daughter/named alternate Executor without bond, is Petitioner.</p> <p>Full IAEA – OK (See note 2)</p> <p>Will dated 04/20/93</p> <p>Residence: Selma Publication: The Business Journal</p> <p>Estimated Value of the Estate: Real property - \$51,000.00</p> <p>Probate Referee: RICK SMITH</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Decedent's will is not self-proving. Need Proof of Subscribing Witness. Publication was made in The Business Journal; however, the Petition states that the Decedent was a resident of Selma. Therefore, pursuant to Local Rule 7.9 publication should be in the Selma Enterprise, if the Decedent lived within the city limits of Selma. |
| Cont. from | | | |
| <input checked="" type="checkbox"/> Aff.Sub.Wit. | <input checked="" type="checkbox"/> x | | |
| <input type="checkbox"/> Verified | | | |
| <input type="checkbox"/> Inventory | | | |
| <input type="checkbox"/> PTC | | | |
| <input type="checkbox"/> Not.Cred. | | | |
| <input checked="" type="checkbox"/> Notice of Hrg | | | |
| <input checked="" type="checkbox"/> Aff.Mail | <input type="checkbox"/> w/ | | |
| <input checked="" type="checkbox"/> Aff.Pub. | | | |
| <input type="checkbox"/> Sp.Ntc. | | | |
| <input type="checkbox"/> Pers.Serv. | | | |
| <input 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 type="checkbox"/> UCCJEA | | | |
| <input type="checkbox"/> Citation | | | |
| <input type="checkbox"/> FTB Notice | | | |
| | | <p>Reviewed by: JF</p> <p>Reviewed on: 07/25/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 2 – Gonzalez</p> | |

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

| | | |
|-----------------|--|--|
| Age: 8 months | TEMP EXPIRES 7-30-13 | NEEDS/PROBLEMS/COMMENTS: |
| | HELEN RILEY, Paternal Aunt, is Petitioner. | <u>Note:</u> Page 5B is a competing petition. |
| | Father: EDWARD (AKA JESSE) VENEGAS - Nominates, consents, and waives notice | <u>Note:</u> Per Minute Order 6-3-13, the Court orders that there be no visitation between father and the child. |
| Aff.Sub.Wit. | Mother: CECILIA MARROQUIN | <u>Note:</u> Petitioner resides in Visalia, which is in Tulare County. |
| ✓ Verified | Paternal Grandfather: Joe Venegas | 1. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 on <u>Cecilia Marroquin (Mother)</u> . |
| Inventory | Paternal Grandmother: Mary Helen Venegas (Deceased) | <u>Note:</u> Petitioner filed a declaration of due diligence; however, the mother is currently in Fresno County Jail, which means she can be found for service. |
| PTC | Maternal Grandfather: Renato Marroquin | 2. 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 on: |
| Not.Cred. | - Served by mail 6-14-13 | - Joe Venegas (Paternal Grandfather) |
| ✓ Notice of Hrg | Maternal Grandmother: Sandra Garcia | - Sandra Garcia (Maternal Grandmother) |
| ✓ Aff.Mail | Petitioner states the mother is not fit to have the minor in her care. She has been hiding from the authorities because of a warrant due to her criminal activity involvement. The father is working as a truck driver and has little time for his child. | Reviewed by: skc |
| Aff.Pub. | Court Investigator Charlotte Bien filed a report on 7-15-13. | Reviewed on: 7-25-13 |
| Sp.Ntc. | | Updates: |
| Pers.Serv. | | Recommendation: |
| ✓ Conf. Screen | | File 5A – Marroquin |
| ✓ Letters | | |
| ✓ Duties/Supp | | |
| Objections | | |
| Video Receipt | | |
| ✓ CI Report | | |
| ✓ Clearances | | |
| ✓ Order | | |
| Aff. Posting | | |
| Status Rpt | | |
| ✓ UCCJEA | | |
| Citation | | |
| FTB Notice | | |

5B Analiyah Marroquin (GUARD/P)

Case No. 13CEPR00449

Atty Marroquin, Renato Javier (Pro Per – Maternal Grandfather – Competing Petitioner)

Atty Murillo, Priscilla Ramona (Pro Per – Co-Petitioner)

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

| | | |
|---|--|---|
| Age: 8 months | RENATO JAVIER MARROQUIN , Maternal Grandfather, and PRISCILLA RAMONA MURILLO , his girlfriend, are Petitioners. | NEEDS/PROBLEMS/ COMMENTS: <u>If this petition goes forward, the following issues exist:</u> 1. Need Notice of Hearing. 2. Need proof of service of Notice of Hearing with copy of petition on parents and other relatives per Probate Code §1511. |
| | HELEN RILEY , Paternal Aunt, was granted temporary guardianship on 5-22-13. See Page 5A. | |
| <input type="checkbox"/> Aff.Sub.Wit. | Father: EDWARD (AKA JESSE) VENEGAS | |
| <input checked="" type="checkbox"/> Verified | Mother: CECILIA MARROQUIN | |
| <input type="checkbox"/> Inventory | Paternal Grandfather: Joe Venegas | |
| <input type="checkbox"/> PTC | Paternal Grandmother: Mary Helen Venegas (Deceased) | |
| <input type="checkbox"/> Not.Cred. | Maternal Grandfather: Renato Marroquin | |
| <input type="checkbox"/> Notice of Hrg | - Served by mail 6-14-13 | |
| <input type="checkbox"/> Aff.Mail | Maternal Grandmother: Sandra Garcia | |
| <input type="checkbox"/> Aff.Pub. | Petitioner states the mother will be entering a drug program and may face jail time and the supposed father Jesse Venegas is a child molester (see attached). | |
| <input type="checkbox"/> Sp.Ntc. | Court Investigator Charlotte Bien filed a report on 7-15-13. | |
| <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 checked="" type="checkbox"/> Clearances | | |
| <input 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: skc |
| | | Reviewed on: 7-25-13 |
| | | Updates: |
| | | Recommendation: |
| | | File 5B – Marroquin |

5B

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|--|---|---|------------|--|-----------|--|-----|--|-----------|--|-----------------|--|------------|---|----------|--|---------|--|------------|--|--------------|--|---------|--|-------------|--|------------|--|---------------|--|-----------|--|------|--|---------|--|--------------|--|------------|--|--------|--|----------|--|------------|--|--|--|
| Bernice C. Kasabian DOD: 1-17-13 | <p>JENNIFER KAPUR, Granddaughter and beneficiary, is Petitioner.</p> <p>Petitioner states that to her knowledge, the Settlor amended the trust seven times; however, she does not know if she has a complete copy. Petitioner is informed and believes that Dana T. Kahler was named in the seventh amendment as successor trustee; however, has never received the notice required pursuant to Probate Code §16061.7, although it has been more than 60 days since the death of the Settlor.</p> <p>Petitioner states she is informed and believes that the principal place of administration is the address of Dana T. Kahler in Fresno, and alleges that the trust assets consist of real property in Fresno and Madera, as well as various accounts, etc.</p> <p>Petitioner's attorney sent a letter on 3-26-13 to Dana Kahler, but no response has been received.</p> <p>Petitioner lists 23 people as the vested or contingent beneficiaries and provides a copy of the trust and seven amendments. Note: The copy of the sixth amendment provided is not signed or dated.</p> <p>Petitioner prays for an order:</p> <ol style="list-style-type: none"> 1. Declaring that Dana T. Kahler is now and at all times mentioned herein has been holding the "trust property" described in this petition for the benefit of Petitioner under the terms of the trust; 2. Compelling Dana T. Kahler to provide a true and correct copy of the trust, including the operative amendments thereto; 3. Compelling Dana T. Kahler to account fully for all trust property; 4. For all costs herein; and 5. For such other orders as the court may deem proper. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Petitioner states the names and last known addresses of <u>all vested or contingent beneficiaries</u>; however, this statement does not cover the requirement set forth in Probate Code §17201. Need verification that this list covers each person <u>entitled to notice</u> under §17203, which may include persons who are not beneficiaries. 2. Examiner notes that the trust and all of the amendments appear to have been prepared by Attorney Gregory J. Roberts. Petitioner states a letter was sent to Dana T. Kahler at what appears to be a residence address; however, Petitioner does not indicate whether inquiry has been made to Attorney Roberts regarding the status of the trust and trustee. The Court may require clarification with reference to Probate Code §17200(b)(7), which allows proceedings if, <u>after reasonable request</u>, information is not received. 3. Petitioner states that she does not know if the copies provided are the entire trust, but requests that the Court determine that Dana Kahler, who is named as successor trustee in the 7th amendment, is holding property FBO Petitioner (a determination of the validity of the 7th amendment). The Court may require further information. <p>Reviewed by: skc</p> <p>Reviewed on: 7-25-13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 6 – Kasabian</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table border="1"> <tr><td>Aff.Sub.Wit.</td><td></td></tr> <tr><td>✓ Verified</td><td></td></tr> <tr><td>Inventory</td><td></td></tr> <tr><td>PTC</td><td></td></tr> <tr><td>Not.Cred.</td><td></td></tr> <tr><td>✓ Notice of Hrg</td><td></td></tr> <tr><td>✓ Aff.Mail</td><td>W</td></tr> <tr><td>Aff.Pub.</td><td></td></tr> <tr><td>Sp.Ntc.</td><td></td></tr> <tr><td>Pers.Serv.</td><td></td></tr> <tr><td>Conf. Screen</td><td></td></tr> <tr><td>Letters</td><td></td></tr> <tr><td>Duties/Supp</td><td></td></tr> <tr><td>Objections</td><td></td></tr> <tr><td>Video Receipt</td><td></td></tr> <tr><td>CI Report</td><td></td></tr> <tr><td>9202</td><td></td></tr> <tr><td>✓ Order</td><td></td></tr> <tr><td>Aff. Posting</td><td></td></tr> <tr><td>Status Rpt</td><td></td></tr> <tr><td>UCCJEA</td><td></td></tr> <tr><td>Citation</td><td></td></tr> <tr><td>FTB Notice</td><td></td></tr> </table> | 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 | | 9202 | | ✓ Order | | Aff. Posting | | Status Rpt | | UCCJEA | | Citation | | FTB Notice | | | |
| 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 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 9202 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ✓ Order | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Aff. Posting | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Status Rpt | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| UCCJEA | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Citation | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| FTB Notice | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Petition for Order Confirming Successor Trustee and Trust Assets

| | | |
|-------------------------------------|--|--|
| Lewis Roberts, Jr. DOD: 12-30-12 | LEWIS W. ROBERTS, III, Son and Named and presently acting Successor Co-Trustee, is Petitioner. | NEEDS/PROBLEMS/COMMENTS: |
| | Petitioner states the decedent created the trust on 12-21-05, and restated on 3-30-09 (attached). Petitioner believes the trust is valid. | Note: The properties requested to be determined are <u>not</u> listed in Schedule A of the trust; however, Petitioner refers to Trust §1.03 and states the decedent intended all real and personal property, including after-acquired property, to be held in the trust. |
| Aff.Sub.Wit. | | |
| ✓ Verified | Petitioner states he is the named initial successor co-trustee. Petitioner states he and Ida A. Bentley (decedent's daughter and successor co-trustee) are the heirs at law and beneficiaries. | 4. Petitioner states the names and last known addresses of <u>decedent's heirs at law, the persons named and beneficiaries</u> ; however, this statement does not cover the requirement set forth in Probate Code §17201. |
| Inventory | | |
| PTC | | |
| Not.Cred. | | |
| ✓ Notice of Hrg | Petitioner requests the Court confirm the assets set forth in Exhibit B as assets subject to the trust pursuant to the terms of the trust and various authority (Heggstad, etc.), as the trustor expressly stated his intent to transfer <u>all</u> assets to the trust. | Need verification that this list covers each person <u>entitled to notice</u> under §17203, which may include persons who are not beneficiaries. |
| ✓ Aff.Mail | | |
| Aff.Pub. | | |
| Sp.Ntc. | | |
| Pers.Serv. | | |
| Conf. Screen | | |
| Letters | | |
| Duties/Supp | Petitioner states that the decedent's will devise all assets to the trust, and as such, submits that the decedent's intent to transfer his assets to the trust was clearly established and further, probate of the estate would result in the same distribution. | Examiner notes that additional persons who may be entitled to notice are: - Raquel Lizarde (friend – mentioned in trust) - persons associated with the properties requested to be determined as assets of the trust, whose right, title or interest may be affected (Probate Code §17203) |
| Objections | | |
| Video Receipt | | |
| CI Report | | |
| 9202 | | |
| ✓ Order | Petitioner prays for an order that: | 5. Petitioner requests an order that the assets are subject to his control (only) as successor co-trustee, without mention of the other successor co-trustee, Ida A. Bentley. The Court may require clarification and revised order that the properties are subject to the control of <u>both</u> co-trustees. |
| Aff. Posting | 1. The LEWIS W. ROBERTS, JR. REVOCABLE LIVING TRUST under TRUST agreement dated December 21, 2005, is in existence; and | Reviewed by: skc |
| Status Rpt | | Reviewed on: 7-26-13 |
| UCCJEA | | Updates: |
| Citation | 2. The asset set forth on Exhibit "B" are subject to the management and control of Petitioner as Successor Co-Trustee of the trust. | Recommendation: |
| FTB Notice | | File 7 – Roberts |

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

| | | | |
|--------------------------|---------------|-----------------------|---|
| Age: | | | NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED TO 08/22/13</u> Per request of counsel |
| DOD: | | | |
| | | | |
| | | | |
| Cont. from | | | |
| <input type="checkbox"/> | Aff.Sub.Wit. | | |
| <input type="checkbox"/> | Verified | | |
| <input type="checkbox"/> | Inventory | | |
| <input type="checkbox"/> | PTC | | |
| <input type="checkbox"/> | Not.Cred. | | |
| <input type="checkbox"/> | Notice of Hrg | | |
| <input type="checkbox"/> | Aff.Mail | | |
| <input type="checkbox"/> | Aff.Pub. | | |
| <input type="checkbox"/> | Sp.Ntc. | | |
| <input type="checkbox"/> | Pers.Serv. | | |
| <input type="checkbox"/> | Conf. Screen | | |
| <input type="checkbox"/> | Letters | | |
| <input type="checkbox"/> | Duties/Supp | | |
| <input type="checkbox"/> | Objections | | |
| <input type="checkbox"/> | Video Receipt | | |
| <input type="checkbox"/> | CI Report | | |
| <input type="checkbox"/> | 9202 | | |
| <input type="checkbox"/> | Order | | |
| <input type="checkbox"/> | Aff. Posting | | |
| <input type="checkbox"/> | Status Rpt | | |
| <input type="checkbox"/> | UCCJEA | | |
| <input type="checkbox"/> | Citation | | |
| <input type="checkbox"/> | FTB Notice | | |
| | | Reviewed by: JF | |
| | | Reviewed on: 07/25/13 | |
| | | Updates: | |
| | | Recommendation: | |
| | | File 8 – Diener | |

Atty Petty, Jonathon L. (for Alex Brehm – friend/Petitioner)

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

| | | | |
|-------------------------------------|----------------------|---|--|
| DOD: 06/08/13 | | <p>ALEX BREHM, friend, is Petitioner and requests appointment as Administrator without Bond.</p> <p>All heirs waive bond</p> <p>Full IAEA – OK</p> <p>Decedent died intestate</p> <p>Residence: Fresno Publication: The Business Journal</p> <p>Estimated Value of the Estate: Personal property - \$ 15,000.00 Annual income - 7,200.00 Real property - 170,000.00 Total - \$192,200.00</p> <p>Probate Referee: RICK SMITH</p> | <p>NEEDS/PROBLEMS/COMMENTS:</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 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 type="checkbox"/> | UCCJEA | | |
| <input type="checkbox"/> | Citation | | |
| <input type="checkbox"/> | FTB Notice | | |
| | | <p>Reviewed by: JF</p> <p>Reviewed on: 07/25/13</p> <p>Updates:</p> <p>Recommendation: SUBMITTED</p> <p>File 9 – Worstell</p> | |

Petition for Visitation

| | | | |
|---------------------------------|-----|--|--|
| Jesus Gonzalez Rodriguez, age 9 | | <p>JESUS N. GONZALEZ, Father, is Petitioner.</p> <p>MARIA IBARRA, Maternal Grandmother, was appointed Guardian on 6-26-08. - served by mail 5-27-13</p> <p>Mother: Patricia Rodriguez (Deceased) Paternal Grandfather: Jose Gonzalez Paternal Grandmother: Josefina Gonzalez Maternal Grandfather: Lorenzo Rodriguez</p> <p>Petitioner requests to have custody of his son and to have his case reviewed. Petitioner sees no reason for his son to be with his grandmother when he is fully capable and willing to be fully responsible for his son. Petitioner doesn't feel the visitation that he is allowed is sufficient to fully bond with his son, especially now that he will be having a sibling. Petitioner believes it is in his son's best interest to be closer to his little brother and father than the 2 hours a week that is currently allowed (sometimes less because the grandmother arrives late).</p> <p>Petitioner believes his son needs a father figure and he and his wife are able to provide a stable house for his son. Petitioner states there is no need for his son to continue living with his grandmother when he has a loving father who wants to be a part of his life.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> At hearing on 6-26-08, the Court ordered supervised visitation every Sunday 10am-2pm at McDonalds in Kerman.</p> <p><u>This petition was filed 5-7-13.</u></p> <p><u>Continued from 6-11-13</u></p> <p><u>Minute Order 6-11-13:</u> Rosie Valdivinos is sworn and interprets for Maria Ibarra. The Court orders that visitation continue as previously ordered. The court investigator is ordered to contact all the parties for the purpose of obtaining additional information that may be helpful to the Court in determining visitation. Matter continued to 7/30/13.</p> <p><u>Need CI Report per Minute Order.</u></p> <p>1. This petition was filed as a petition for <u>visitation</u>; however, it appears that <u>Petitioner</u> wishes to request review and <u>termination</u> of the guardianship.</p> <p>If so, Petitioner must file a <u>Petition for Termination of Guardianship (Mandatory Judicial Council Form GC-255)</u> and a new investigation will be completed. (Investigations are not performed for visitation requests.)</p> <p>Petitioner may obtain a Petition for Termination of Guardianship at the Probate Clerk's Office.</p> |
| Cont. from 061113 | | | |
| Aff.Sub.Wit. | | | |
| ✓ Verified | | | |
| Inventory | | | |
| PTC | | | |
| Not.Cred. | | | |
| ✓ Notice of Hrg | | | |
| ✓ Aff.Mail | w/o | | |
| 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: 7-25-13 | |
| | | Updates: | |
| | | Recommendation: | |
| | | File 10 – Rodriguez | |

Petition for Termination of Guardianship

| | | |
|-------------------------|---|---|
| Age: 6 DOB: 09/10/06 | SHANNON HODSON, mother, is Petitioner. | NEEDS/PROBLEMS/COMMENTS: 1. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition to Terminate Guardianship</i> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for: - Pete Gonzalez (father) - Pauline Murillo (paternal grandmother) - Paternal grandfather (unknown) - Maternal grandfather (unknown) - Jasmyn Mendoza (sister) - Alycia Mendoza (sister) |
| | OLIVIA GONZALES, half-sister, was appointed Guardian on 10/01/09. – <i>Personally served on 07/05/13</i> | |
| Cont. from | Father: PETE GONZALEZ | |
| Aff.Sub.Wit. | | |
| ✓ Verified | Paternal grandfather: UNKNOWN | |
| Inventory | Paternal grandmother: PAULINE MURILLO | |
| PTC | | |
| Not.Cred. | Maternal grandfather: UNKNOWN | |
| ✓ Notice of Hrg | Maternal grandmother: SUSAN TUCKER – <i>Consent & Waiver of Notice signed 05/24/13</i> | |
| Aff.Mail | x Siblings: JASMYN MENDOZA (18), ALYCIA MENDOZA (16) | |
| Aff.Pub. | | |
| Sp.Ntc. | | |
| ✓ Pers.Serv. | Petitioner requests that the guardianship be terminated. She states that Leo has transitioned to staying in her home at bi-weekly intervals since mid-February 2013. | |
| Conf. Screen | | |
| Letters | | |
| Duties/Supp | | |
| Objections | Court Investigator Jennifer Daniel filed a report on 07/23/13. The report states that Ms. Hodson has demonstrated the ability to provide stability for her son. It appears that guardianship is no longer necessary. It is therefore recommended that the petition be GRANTED . The report further recommends that bi-weekly visitation continue with the guardian until school starts and that once school starts, that Leo continue to have frequent and continuing contact with his sister/guardian Olivia Gonzalez. | |
| Video Receipt | | |
| ✓ CI Report | | |
| 9202 | | |
| ✓ Order | | |
| Aff. Posting | | |
| Status Rpt | | |
| UCCJEA | | |
| Citation | | |
| FTB Notice | | |
| | | Reviewed by: JF |
| | | Reviewed on: 07/25/13 |
| | | Updates: |
| | | Recommendation: |
| | | File 11 – Gonzalez |

Petition for Visitation

| | | | |
|--|---|---|-------------------------------------|
| Tavian, 14 | KRISTINE CIOLKOSZ, mother, is Petitioner. | NEEDS/PROBLEMS/COMMENTS: | |
| Angel, 13 | | | |
| Ayries, 12 | | | |
| Cont. from | | | |
| <input type="checkbox"/> Aff.Sub.Wit. | MICHELLE COOKS, maternal aunt, was appointed guardian of the minors on 07/12/10. Father: BRUCE BALL Paternal grandfather: JIMMIE BALL Paternal grandmother: VIVIAN BREWER Maternal grandfather: MICHAEL CIOLKOSZ Maternal grandmother: SHIRLEY CIOLKOSZ Petitioner states that she has moved to a two bedroom apartment and has a safe and stable environment. She states that she is able to provide for all aspects of taking care of the children when the visit. Petitioner states that a friend of hers, Jodi Bingley, has offered to pick up the children at an agreeable location and transport them. Petitioner requests visitation every weekend, holidays and all school breaks, including summer vacation. | <p>Note: The guardianship also originally included Jelisa Ball and Tayler Ball, however they are both now 18 or over; therefore the guardianship has terminated in reference to them.</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> for: <ul style="list-style-type: none"> - Michelle Cooks (guardian) - Bruce Ball (father) - Jimmie Ball (paternal grandfather) - Vivian Brewer (paternal grandmother) - Michael Ciolkosz (maternal grandfather) - Shirley Ciolkosz (maternal grandmother) - Tavian Ball (minor) - Angel Ball (minor) - Ayries Ball (minor) | |
| <input checked="" type="checkbox"/> Verified | | | |
| <input type="checkbox"/> Inventory | | | |
| <input type="checkbox"/> PTC | | | |
| <input type="checkbox"/> Not.Cred. | | | |
| <input type="checkbox"/> Notice of Hrg | | | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> Aff.Mail | | | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> Aff.Pub. | | | |
| <input type="checkbox"/> Sp.Ntc. | | | |
| <input type="checkbox"/> Pers.Serv. | | | |
| <input type="checkbox"/> Conf. Screen | | | |
| <input type="checkbox"/> Letters | | | |
| <input type="checkbox"/> Duties/Supp | | | |
| <input type="checkbox"/> Objections | | | |
| <input type="checkbox"/> Video Receipt | | | |
| <input type="checkbox"/> CI Report | | | |
| <input type="checkbox"/> 9202 | | | |
| <input type="checkbox"/> Order | <input checked="" type="checkbox"/> | | |
| <input type="checkbox"/> Aff. Posting | | | |
| <input type="checkbox"/> Status Rpt | | | |
| <input type="checkbox"/> UCCJEA | | | |
| <input type="checkbox"/> Citation | | | |
| <input type="checkbox"/> FTB Notice | | | |
| | | Reviewed by: JF | |
| | | Reviewed on: 07/25/13 | |
| | | Updates: | |
| | | Recommendation: | |
| | | File 12 – Ball | |