



## ATTENTION

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

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

Thank you for your patience.

**(1) First and Final Account and Report of Executor and Petition for Its Settlement, (2) for Allowance of Compensation for Ordinary Services, (3) for Attorney's Fees for Ordinary Services and (4) for Final Distribution**

<b>DOD: 10/6/2001</b>		<b>SARAH LOPEZ</b> , Executor, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Accounting 6/25/02 – 6/25/14	
		Accounting - <b>\$164,443.71</b>	
<b>Cont. from</b>		Beginning POH - <b>\$157,395.49</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Ending POH - <b>\$ 2,956.02</b>	
<input checked="" type="checkbox"/>	<b>Verified</b>	Attorney - <b>\$2,956.02</b> (less than the statutory amount of \$4,215.01)	
<input checked="" type="checkbox"/>	<b>Inventory</b>	Executor - <b>\$4,886.00</b> (greater than the statutory amount of \$4,215.01)	
<input checked="" type="checkbox"/>	<b>PTC</b>	<b>Petition states</b> in December 2004 petitioner informed counsel that she had withdrawn her statutory compensation based on counsel's 6/5/04 letter to the Department of Health Services, informing them of the status of the estate. Petitioner mistakenly believed, based on the letter that she could withdraw said compensation. At that time counsel informed the petitioner that she was not authorized to pay herself and inquired as to the petitioner's ability to return the funds to the estate. Petitioner informed counsel that the funds had been spent on moving and living expenses. Counsel informed Petitioner that he needed to research the issue. Thereafter, counsel was involved in two trials. In addition counsel's elder mother, became ill and needed his assistance and care. Sometime in the late fall of 2005 counsel's files for this estate were mistakenly placed into storage. Counsel had no further contact with the petitioner and failed to file a petition for final distribution. Counsel completely forgot about this case until he received a Notice of Status Hearing from the court.	
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	W/	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input checked="" type="checkbox"/>	<b>Sp.Ntc.</b>	W/	
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>	6/25/02	
<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 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 type="checkbox"/>	<b>FTB Notice</b>	N/A	
<b>Please see additional page</b>			
			<b>Reviewed by: KT</b>
			<b>Reviewed on: 7/28/14</b>
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 1 – Nelson</b>

Petition states the executor withdrew a total of \$4,886.00 from the estate without consulting counsel under the mistaken belief that she was entitled to said funds. The balance of the estate's bank account prior to the Executor's unauthorized withdrawal was \$8,236.02, which amount is insufficient to pay both the Executor and Attorney the full statutory compensation of \$4,215.01 each. The attorney for the executor agrees to accept the sum of \$2,956.09 as total compensation for his ordinary services.

<b>DOD: 3-11-04</b>	<b>PUBLIC ADMINISTRATOR</b> , Successor Administrator, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. The Public Administrator was appointed 3-6-08 and Letters issued 4-1-08. Petitioner does not provide an explanation as to the delay in administration. The Court may require clarification.</p>
<b>Cont. from 061814</b>	<b>I&amp;A filed 3-5-07</b> indicated a total estate value of \$466,587.93 consisting of \$181,237.93 cash plus real and personal property.	
<b>Aff.Sub.Wit.</b>	<b>History: JENNIFER TROTTIER</b> , a resident of Portland, Oregon, was appointed as Executor with full IAEA without bond on 8-3-04. Ms. Trottier was removed as Executor on 3-6-08. Ms. Trottier had filed a petition for final distribution, which was not settled.	
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	<b>Petitioner states</b> there are no assets in possession of the Public Administrator. According to the former Executor's petition for final distribution, she distributed the furnishings, vehicle, and \$90,000, in addition to monthly payments totaling \$24,475 to the decedent's mother, and paid Attorney James Hurbutt \$368 for legal services, all without court authorization. At the end of her account period, she claimed there was \$19,224.98 on deposit at EECU; however, the Public Administrator contacted the credit union on 4-7-14 and they did not find anything under the account number, name, or social security number. Without a detailed schedule of disbursements, Petitioner cannot say whether the former Executor gave away or kept the assets. Ms. Trottier did not return a phone call.	
<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>	There are no assets for distribution. Ms. Trottier breached her fiduciary duty by making distributions without court order and by failing to account for estate assets. Therefore, she should be surcharged the full amount listed on the Inventory and Appraisal: \$466,587.93. At least one creditor filed a claim for which there is no documentation of payment. Ms. Trottier may have received funds that should have gone to the Oregon bankruptcy court. Katharine Lovely may not have received her full share of the estate.	
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>	<p>Because Ms. Trotter did not account for the assets she administered, she should be liable for all of them. The surcharge should be assigned to any outstanding creditor or beneficiary so that they may collect on their debts.</p> <p><b>Petitioner prays that:</b></p> <ol style="list-style-type: none"> <li>1) The final report be settled, allowed and approved as filed, and all acts and proceedings of Petitioner as Administrator be confirmed and approved;</li> <li>2) The Court find that Jennifer Trottier, as former administrator, is personally liable to the estate for \$466,587.93;</li> <li>3) An assignment of surcharge be made to outstanding creditors and beneficiaries;</li> <li>4) the administration of the estate be closed;</li> <li>5) the Public Administrator be discharged as successor administrator; and</li> <li>6) for such other and further orders as the Court considers just and proper.</li> </ol>	

**Reviewed by:** skc  
**Reviewed on:** 7-28-14  
**Updates:**  
**Recommendation:**  
**File 2 - Trottier**

**(1) First Account and Status Report of Administrator, and (2) to set Aside Exempt Personal Property**

<b>DOD: 9/18/2007</b>	<b>LAURA DOZIER</b> , surviving spouse/Administrator, is petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>There have been 7 continuances in this matter without any updates. As of 7/28/14 the following issues remain:</b></p> <ol style="list-style-type: none"> <li>Petition does not allege any fact as to why the personal property should be set aside for the surviving spouse.</li> <li>Disbursement schedule does not include the nature and purpose of each disbursement as required by Probate Code §1062(b).</li> <li>Petition states the Petitioner used the proceeds from the sale of a bulldozer to reimburse herself various administrative expenses. Need itemization.</li> <li>Need order</li> </ol> <p><b>Note:</b> If the petition is granted the court will set a status hearing for the filing of the petition for final distribution on <b>Friday, September 26, 2014 at 9:00 a.m. in Dept. 303.</b></p> <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>
	Account period: 2/4/2008 – 9/30/2013	
	Accounting - <b>\$650,755.95</b>	
	Beginning POH - <b>\$650,750.00</b>	
	Ending POH - <b>\$333,000.00</b>	
<b>Cont. from 121113, 020314, 022414, 032414, 042114, 051914, 063014</b>	<p><b>Petitioner states</b> certain assets that were decedent's separate property constitute exempt personal property eligible to be set aside to the surviving spouse pursuant to Probate Code §6510. Petitioner requests the court set aside the following personal property with an aggregate value of \$10,250.00</p> <ul style="list-style-type: none"> <li>1997 Chevrolet pickup truck</li> <li>2005 Honda ATV R1V32</li> <li>2005 KTM Motorcycle</li> <li>1963 Willy Jeep</li> </ul> <p>Petitioner states as surviving spouse, she is entitled to have the assets set over to her. Petitioner has already taken possession of the assets and requests that her actions be ratified and confirmed.</p> <p>Petitioner states the estate is not yet in a position to close. An action was filed on a rejected creditor's claim. The estate defaulted. The estate now is reviewing the situation to see whether it is possible to file a motion to set aside the default. Petitioner believes it will take an additional 4-6 months to close the estate.</p> <p style="text-align: center;"><b>Please see additional page</b></p>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>		
<input checked="" type="checkbox"/> <b>Inventory</b>		
<input checked="" type="checkbox"/> <b>PTC</b>		
<input checked="" 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 checked="" type="checkbox"/> <b>Letters</b> 2/4/08		
<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 checked="" type="checkbox"/> <b>9202</b>		
<input type="checkbox"/> <b>Order</b> X		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>		
<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 7/28/14</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 3 – Dozier</b></p>		

**Petitioner prays for an order:**

1. That the First Account and Report of Petitioner be settled, allowed and approved as filed;
2. That all actions of Petitioner as Administrator, as set forth in the petition, account and report be ratified, confirmed and approved;
3. That the exempt personal property described in the petition be set aside to the surviving spouse;
4. That the administration of the estate continue.

**4 Justine Coleman (Estate)**

**Case No. 10CEPR00907**

**Atty Willoughby, Hugh W. (for Robert Winkler – Executor/Petitioner)**

**(1) Final Account and Report and (2) Petition for Final Distribution and (3) for Allowance of Compensation for Ordinary and Extraordinary Services**

<b>DOD: 08/26/10</b>	<b>JUSTINE COLEMAN</b> , Executor, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Account period: <b>08/26/10 – 06/15/14</b>	
<b>Cont. from</b>	Accounting - <b>\$291,321.08</b>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Beginning POH - <b>\$160,774.00</b>	
<input checked="" type="checkbox"/> <b>Verified</b>	Ending POH - <b>\$170,217.39</b>	
<input checked="" type="checkbox"/> <b>Inventory</b>	Executor (statutory) - <b>\$8,428.42</b>	
<input checked="" type="checkbox"/> <b>PTC</b>	Attorney (statutory) - <b>\$8,428.42</b>	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	Attorney x/o - <b>\$1,275.00</b>	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	(itemized by date for work related to collecting assets of decedent's predeceased mother's estate, resulting in distribution of assets to this estate)	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	<b>Distribution, pursuant to decedent's estate, is to:</b>	
<input type="checkbox"/> <b>Aff.Pub.</b>	American Lung Association - \$50,695.18	
<input type="checkbox"/> <b>Sp.Ntc.</b>	American Cancer Society - \$50,695.18	
<input type="checkbox"/> <b>Pers.Serv.</b>	Marjaree Mason Center - \$50,695.18	
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>   12/08/10		
<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 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> JF
		<b>Reviewed on:</b> 07/28/14
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 4 – Coleman</b>

Second Amended First Account and Report of Conservators; Petition for Allowance of Fees to Attorney for Conservators

<b>Age: 41 years</b>	<b>MANUEL CHAVEZ</b> , father, and <b>SUSAN CHAVEZ-LEON</b> , sister, Co-Conservators of the Person and Estate, are Petitioners.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>Continued from 7/2/14. As of 7/28/14 the following issues remain:</b>
<b>Cont. from 052114, 070214</b>	<b>Account period: 12/19/12 - 11/30/13</b>	<b>Problems include but are not limited to:</b>
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Accounting - <b>\$309,801.00</b>	<ol style="list-style-type: none"> <li>All amounts listed in the accounting and on the inventory are rounded off. The accounting must include the actual amounts.</li> <li>Corrected Inventory and Appraisal filed on 4/15/14 does not include attachment 2. The property listed on attachment 1 totals \$18,534 and not \$33,621 as listed. Therefore the total for the corrected inventory and appraisal is not \$255,621.</li> <li>Statement of Cash Assets at the beginning of the account lists assets totaling \$19,633. The assets at the beginning of the account period should be the same as listed on the corrected inventory and appraisal.</li> </ol>
<input checked="" type="checkbox"/> <b>Verified</b>	Beginning POH - <b>\$241,633.00</b>	
<input type="checkbox"/> <b>Inventory</b>	Ending POH - <b>\$230,127.00</b> <i>(\$8,127.00 is cash)</i>	
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Conservator - <b>not requested</b>	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> W/	Attorney - <b>\$7,950.00</b> <i>(per declaration and itemization, for 25.00 hours (reduced from 36.90 hours) @ \$265.00 per hour;)</i>	
<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>	Costs - <b>\$1,035.00</b> <i>(filing fees, process service fee; certified copies)</i>	
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>	Bond - <b>\$201,850.00</b> <i>(sufficient)</i>	
<input type="checkbox"/> <b>Video Receipt</b>	<b>Petitioner prays for an order:</b>	
<input type="checkbox"/> <b>CI Report</b>	<ol style="list-style-type: none"> <li>Approving, allowing, and settling the [First] Account and acts of Co-Conservators; and</li> <li>Authorizing the Attorney fees and costs advanced to the Conservatorship during the accounting period; and</li> <li>Finding that the Conservatee is not able to complete an affidavit of voter registration and is not entitled to vote.</li> </ol>	
<input type="checkbox"/> <b>2620</b> X		
<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>Court Investigator Charlotte Bien's Report filed 9/10/2013.</b>	
		<b>Please see additional page</b>
		<b>Reviewed by: KT</b>
		<b>Reviewed on: 7/28/14</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 5 - Chavez</b>

4. *Schedule C, Disbursements*, contains entry on 6/15/2013 for attorney's fees of **\$5,971.00** to Lance Armo for costs of suit against **HOLLY BILLINGS** for default on loan. Court may require further information regarding the nature and character of the loan, and justification for these attorney's fees having been paid from the Conservatorship estate in contravention of Probate Code § 2647, which provides that no attorney fees may be paid from the estate of the Conservatee without prior Court order. The estate of the Conservatee is not obligated to pay attorney fees established by any engagement agreement or other contract until it has been approved by the Court. [Note: *Schedule A, Receipts* shows entry dated 6/15/2013 for receipt of **\$9,168.00** in proceeds from collection of judgment against Holly Billings for loan default, resulting in receipt of **\$3,197.00.**]
5. Disbursement schedule includes **\$781.00** for dining out from 12/1/12 – 11/30/13. Disbursement must include the nature and purpose of each item and should not be listed as a lump sum.
6. Disbursement schedule includes a payment of **\$608.00** on 1/30/13 to AT&T. Court may require clarification for this large payment.
7. Petition asks for attorney fees totaling **\$7,950.00**. Attorney fees appear to include duplication of work by the attorney and the paralegal. For instance billing statement includes time for the attorney to prepare all the pleadings and also for the paralegal to prepare all the pleadings. The billing statement includes .30 hours (\$74.50) for the attorney to prepare the Duties of Conservator. In addition the billing statement also includes paralegal time of .20 (\$5.00) to prepare the same form. The only thing that needs to be prepared on the Duties of Conservator form is the case name and case number. The billing statement also includes time to prepare a Petition for Exclusive Authority to Give Medical Treatment that was filed at the same time as the Petition for Appointment of Conservator. This was an unnecessary petition in that the request can be made in Petition for Appointment of Conservator. The fees also include time for the preparation of the amended petition.
8. Need care facility statements for Sierra Vista Skilled Nursing Facility. Probate Code §2620(c)(5).

**Note:** Court will set status hearing as follows:

- **Wednesday, January 28, 2015 at 9:00 a.m. in Dept. 303** for the next accounting.

Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the date listed, the hearing will be taken off calendar and no appearance will be required.

**6 Tomas Ybarra (Estate)**

**Case No. 13CEPR00404**

**Atty Kruthers, Heather H. (for Public Administrator – Administrator/Petitioner)**

**(1) First and Final Account and Report of Administrator and (2) Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and (3) for Distribution**

<b>DOD: 01/04/13</b>	<b>PUBLIC ADMINISTRATOR</b> , Administrator, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>CONTINUED FROM 06/11/14</b>  <b>Minute Order from 06/11/14 states: Later and off the record, Mary Ybarra appears and objects to the Petition. The Court rescinds its previous order granting the petition. The matter is continued to 07/30/14.</b></p> <p><b>As of 07/28/14, nothing further has been filed.</b></p> <p><b>Note:</b> The Order previously submitted as signed prior to the order being rescinded. Need new Order.</p>
	Account period: <b>08/29/13 – 03/27/14</b>	
<b>Cont. from 061114</b>	Accounting - <b>\$128,880.79</b>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Beginning POH - <b>\$127,804.50</b>	
<input checked="" type="checkbox"/> <b>Verified</b>	Ending POH - <b>\$12,967.49</b>	
<input checked="" type="checkbox"/> <b>Inventory</b>	Administrator (statutory) - <b>\$4,866.43</b>	
<input checked="" type="checkbox"/> <b>PTC</b>	Administrator x/o - <b>\$2,028.45</b> (per Local Rule for the sale of real property and sale of personal property)	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	Attorney (statutory) - <b>\$4,866.43</b>	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Bond fee - <b>\$161.10</b> (ok)	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> w/	Costs - <b>\$460.50</b> (filing fees and certified copies)	
<b>Aff.Pub.</b>	<b>Petitioner states</b> that after payment of commissions, fees and costs in the amount of \$12,382.91, the remaining \$584.58 will be paid to Frances Ybarra as partial reimbursement for funeral costs. Due to the insufficiency of the estate, there are no assets from which to pay the creditor's of the estate or distribute any property to the heirs.	
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b> 09/04/13		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<input checked="" type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 07/28/14
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 6 - Ybarra</b>

Atty Teixeira, J. Stanley, sole practitioner (for Petitioners Keith D'Ambrosio, second cousin, and Donna K. Farris, proposed Conservatee)

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

Age: 59 years	<b>TEMPORARY EXPIRES 7/30/2014</b>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Court Investigator Advised Rights on 7/16/2014.</b></p> <p>1. Need Conservatorship Video Viewing Certificate pursuant to Local Rule 7.15.9(A).</p> <p><b>Note Re Conservator's Bond:</b> Petitioners state that once a reasonably estimated value of the proposed Conservatee's interest is determined, Petitioners will file a declaration as to the value of the estate and the amount of the bond to be furnished. Court will set Status Hearings as follows:</p> <ul style="list-style-type: none"> <li>• <b>Tuesday, September 30, 2014 at 9:00 am in Dept. 303</b> for Court determination of bond amount and for subsequent filing of proof of bond;</li> <li>• <b>Tuesday, December 9, 2014 at 9:00 a.m. in Dept. 303</b> for filing of inventory and appraisal; and</li> <li>• <b>Wednesday, September 30, 2015 at 9:00 a.m. in Dept. 303</b> for filing of first account of the conservatorship.</li> </ul> <p>Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.</p> <p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 7/28/14</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 7 – Farris</b></p>
Cont. from	KEITH D'AMBROSIO, second cousin, and DONNA K. FARRIS, proposed Conservatee, are Petitioners and request KEITH D'AMBROSIO be appointed as Conservator of the Person and Estate with bond to be filed following determination of the potential interest of the proposed Conservatee in the <b>ESTATE OF TOM STEEL</b> being administered in Oklahoma.	
Aff.Sub.Wit.		
✓ Verified		
Inventory		
PTC		
Not.Cred.		
✓ Notice of Hrg	<b>Estimated Value of the Estate:</b> Personal property - <b>undetermined</b>	
✓ Aff.Mail	<b>Voting Rights NOT affected.</b>	
Aff.Pub.		
Sp.Ntc.		
✓ Pers.Serv.	<b>Petitioners state</b> the proposed Conservatee is developmentally disabled and can manage many basic tasks, but requires and relies on assistance for various aspects of daily living, and that she understands basic concepts needed for medical care, but needs assistance in understanding more theoretical concepts and weighing risks and benefits of treatment. Petitioners state the proposed Conservatee has recently moved from Oklahoma to California to be with family here, as <b>TOM STEEL</b> , who was acting as her unofficial guardian without appointment by the Court in Oklahoma and with whom she had been residing in Oklahoma, died earlier this year and the proposed Conservatee was left to reside alone;	
✓ Conf. Screen		
Aff. Posting		
✓ Duties/Supp		
Objections		
Video Receipt	X	
✓ CI Report		
9202		
✓ Order		
✓ Letters		
Status Rpt		
UCCJEA		
✓ Citation		
FTB Notice		

**Petitioners state, continued:**

- The proposed Conservatee may be entitled to assets in **TOM STEEL'S** estate, and may have claims that property in his estate was misappropriated by him;
- Petitioner's attorney is in communication with the attorney handling matters related to **TOM STEEL'S** estate; however, the nature and extent of the proposed Conservatee's interest in the estate is undetermined at this time, and the Oklahoma attorney cannot pursue any interest the proposed Conservatee may have in **TOM STEEL'S** estate without appointment of a Conservator for her.

**Court Investigator Julie Negrete's Report was filed on 7/23/2014.**

<b>DOD: 06/08/2014</b>		JOYCE YAMAGUCHI, named executor without bond, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Full IAEA – o.k.	
<b>Cont. from</b>		Will dated: 03/12/2014	
	<b>Aff.Sub.Wit.</b>	s/p	
✓	<b>Verified</b>	Residence: Fresno	
	<b>Inventory</b>	Publication: The Business Journal	
	<b>PTC</b>	<b>Estimated value of the Estate:</b>	
	<b>Not.Cred.</b>	Personal property - \$202,000.00	
✓	<b>Notice of Hrg</b>	Real property - \$350,000.00	
	<b>Aff.Mail</b>	<b>Total - \$552,000.00</b>	
✓	<b>Aff.Pub.</b>	Probate Referee: Rick Smith	
	<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>Note: If the petition is granted status hearings will be set as follows:</b>
			<ul style="list-style-type: none"> <li>• <b>Wednesday, 01/07/2015 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <b>and</b></li> <li>• <b>Wednesday, 09/30/2015 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> LV
			<b>Reviewed on:</b> 07/28/2014
			<b>Updates:</b>
			<b>Recommendation:</b> Submitted
			<b>File 8 – Yoshioka</b>

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

<b>DOD: 08/05/2013</b>		<p><b>LAWRENCE STUMPF</b> brother/named executor without bond, is petitioner.</p> <p>Full IAEA – o.k.</p> <p>Will dated: 01/12/2005</p> <p>Residence: Fresno          Publication: The Business Journal</p> <p><b>Estimated value of the Estate:</b>  <b>Personal property - \$360,000.00</b></p> <p>Probate Referee: Rick Smith</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></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>Wednesday, 01/07/2015 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <b>and</b></li> <li>• <b>Wednesday, 09/30/2015 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>
<b>Cont. from</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 checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> w/o		
<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> LV	
		<b>Reviewed on:</b> 07/28/2014	
		<b>Updates:</b>	
		<b>Recommendation:</b> Submitted	
		<b>File 9 – Nilmeier</b>	

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

<b>DOD: 1/29/14</b>	<b>NORMA GADBERRY</b> , named executor without bond, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need date of death of deceased spouse. Local Rule 7/1/1D.  2. Petition does not include a typed copy of the material provisions of the will. Probate Code §8002(b)(1).  3. Harold Wadlington, named alternate executor, was not listed on #8 of the petition.  4. Church of Christ of Caruthers is not listed on #8 of the petition.  5. Need proof of service of the Notice of Petition to Administer the Estate on: a. Harold Wadlington, named alternate executor. b. Church of Christ of Caruthers, beneficiary. - Probate Code 8110(b) <b>Note:</b> If the petition is granted, status hearings will be set as follows:  <ul style="list-style-type: none"> <li>• <b>Wednesday, January 7/2015</b> at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.</li> <li>• <b>Wednesday, September 23, 2015</b> at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.</li> </ul> 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.
<b>Cont. from</b>	Full IAEA – o.k.	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b> S/P	Holographic Will dated: 3/30/1999	
<input checked="" type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>	Residence: Caruthers	
<input type="checkbox"/> <b>PTC</b>	Publication: Fresno Business Journal	
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b> W/	<b>Estimated value of the estate:</b> Real property - <b>\$155,000.00</b>	
<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>Probate Referee: Rick Smith</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: KT</b>
		<b>Reviewed on: 7/28/14</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 10 – Reddell</b>

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

<b>DOD: 3-7-14</b>		<b>IRAN RODRIGUES</b> , Spouse and Named Executor without bond, is Petitioner.  Full IAEA – ok  Will dated 12-2-13  Residence: Fresno Publication: Business Journal  <u>Estimated Value of Estate</u> Personal property: \$50,000.00 Annual income from personal property: \$500.00 Real property: \$425,000.00  Probate Referee: Steven Diebert	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note: Status hearings will be set as follows:</b>  <ul style="list-style-type: none"> <li>• <b>Wednesday, 01/07/2015 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <b>and</b></li> <li>• <b>Wednesday, 09/30/2015 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.	
s/p	<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>			w
✓	<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:</b> skc	
			<b>Reviewed on:</b> 7-28-14	
			<b>Updates:</b>	
			<b>Recommendation:</b> SUBMITTED	
			<b>File 12 – Best-Rodrigues</b>	

<b>Age: 20</b>	<p><b>DEBRA PASLEY</b>, mother, was appointed as Conservator of the Person and Estate pursuant to Order filed 3-5-13 with bond of \$15,000.00. Letters issued on 3-28-13.</p> <p>I&amp;A filed 6-5-13 indicated cash of \$13,438.31.</p> <p>On 1-28-14, the Conservator filed a Post-Move Notice of Change of Residence of Conservatee to Moneta, VA.</p> <p>On 2-5-14, the Court granted the Conservator's Petition to Fix Residence Outside the State of California to Moneta, Virginia and set this status hearing for filing conservatorship of the person and estate (or equivalent) in Virginia.</p> <p><b>Status Report filed 5-22-14 states</b> the conservator and Conservatee have moved to Oklahoma where the Conservator has secured employment. The Conservator is in the process of obtaining local counsel to initiate conservatorship proceedings in Oklahoma. An additional two (2) months is requested.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 3-28-14, 5-28-14</b></p> <p><b>1. Need status of establishing conservatorship of the person and estate (or equivalent) in Virginia.</b></p>
<b>Cont from 032814, 052814</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: skc</b>
		<b>Reviewed on: 7-28-14</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 13 – Pasley</b>

<b>DOD: 07/04/12</b>		<p><b>WILLIAM MARTIN (MARTY) SHIBA</b>, son, was appointed Executor with full IAEA and without bond on 03/28/13. Letters Testamentary were issued on 03/29/13.</p> <p>Inventory &amp; Appraisal, final filed 07/15/13 - \$68,775.68</p> <p><b>Status Report</b> filed 06/20/14 states: The office is currently in the process of preparing the petition and first account current in this matter. Due to unforeseen circumstances, the accounting is currently still in the works. It is anticipated that it will be ready to be filed within the next 30 days to allow time for the executor and his attorney to complete the first and account and report.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u><b>CONTINUED FROM 06/30/14</b></u></p> <p><b>As of 07/28/14, nothing further has been filed.</b></p>
<b>Cont. from 053014, 063014</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:</b> JF	
		<b>Reviewed on:</b> 07/28/14	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 14 - Shiba</b>	

<b>Age: 8 years</b>	<b>CHRISTINA RODRIGUEZ</b> , mother, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Continued from 6/11/14. As of 7/28/14/14 the following issues remain:</b>  1. Need Notice of Hearing.  2. Need proof of service of the Notice of Hearing on: a. Reed Bessegger (guardian) b. Gracie Bissegger (guardian)
<b>Cont. from 050714, 061114</b>	<b>REED BISSEGGER</b> and <b>GRACIE BISSEGGER</b> , maternal grandparents, were appointed guardians on 11/5/2007.	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>	<b>Petitioner states</b> there is currently a court order allowing her visitation with her son once per week. Her mother [guardian], Gracie Bissegger is not allowing visits with her son. She is violating the court order. The last time petitioner spoke with the guardian she stated that she has moved and is not letting Petitioner know her new address. She also changed her phone number so now Petitioner has no contact with her.	
<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>		
<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>	<b>Current visitation order</b> per minute order dated 7/19/12 states the prior order of 10/1/09 remains in full force and effect (see below). The guardian is ordered to cooperate with visitation. Parties mutually agree on a location for visitation. The court orders that if mother is visiting at the guardian's home, she is to come alone. Mother is directed to contact the guardian to arrange visitation.	
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202 Order</b>	X	
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>	Minute order dated 10/1/09 states the court orders supervised visitation with the mother. The court will not allow overnight visits at this time. Parties can mutually agree on the times.	
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by: KT</b>
		<b>Reviewed on: 7/28/14</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 15 - Lopez</b>

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

<b>DOD: 07/22/13</b>	<b>KATHLEEN WYNN</b> , daughter, is Petitioner and requests appointment as Administrator without bond.		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>The Petition is inconsistent regarding whether decedent had a will or died intestate (without a will). Need clarification. If decedent had a will, a copy of the will must be attached to the Petition and the original must be deposited with the Court. If the decedent died intestate, need waivers of bond from all heirs or bond in the amount of \$105,500.00.</li> <li>Need proof of publication.</li> <li>The Petitioner indicates that the decedent had a predeceased spouse. Need name and date of death of predeceased spouse pursuant to Local Rule 7.1.1D.</li> <li>Need Confidential Supplement to Duties and Liabilities (form DE-147S).</li> <li>Need Order &amp; Letters.</li> </ol> <p><b>Note: If the petition is granted status hearings will be set as follows:</b></p> <ul style="list-style-type: none"> <li><b>Wednesday, January 7, 2015 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <b>and</b></li> <li><b>Wednesday, September 2, 2015 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>
	Full IAEA – <b>NEED PUBLICATION</b>		
<b>Cont. from</b>	Will dated or Decedent died intestate? -(See note 1)		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Residence: Kingsburg		
<input checked="" type="checkbox"/> <b>Verified</b>	Publication: <b>NEED PUBLICATION</b>		
<input type="checkbox"/> <b>Inventory</b>	<b>Estimated value of the estate:</b>		
<input type="checkbox"/> <b>PTC</b>	Personal property - \$ 5,000.00		
<input type="checkbox"/> <b>Not.Cred.</b>	Real property - 100,000.00		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	<b>Total - \$105,000.00</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	w/	Probate Referee: <b>STEVEN DIEBERT</b>	
<input type="checkbox"/> <b>Aff.Pub.</b>	x		
<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>	x		
<input type="checkbox"/> <b>Duties/Supp</b>	x		
<input type="checkbox"/> <b>Objections</b>			
<input type="checkbox"/> <b>Video Receipt</b>			
<input type="checkbox"/> <b>CI Report</b>			
<input type="checkbox"/> <b>9202</b>			
<input type="checkbox"/> <b>Order</b>	x		
<input type="checkbox"/> <b>Aff. Posting</b>			
<input type="checkbox"/> <b>Status Rpt</b>			
<input type="checkbox"/> <b>UCCJEA</b>			
<input type="checkbox"/> <b>Citation</b>			
<input type="checkbox"/> <b>FTB Notice</b>			
<b>Reviewed by:</b> JF			
<b>Reviewed on:</b> 07/28/14			
<b>Updates:</b>			
<b>Recommendation:</b>			
<b>File 18 – Morse</b>			