

Probate Status Hearing Re: Failure to File a First Account or Petition for Final Distribution

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| DOD: 5/23/2005 | <p>VIVIAN WEST was appointed as Administrator with full IAEA authority and without bond on 8/23/05.</p> <p>Letters issued on 8/24/2005.</p> <p>I & A showing the estate valued at \$190,700.00 was filed on 12/12/2005.</p> <p>Notice of Status Hearing was mailed to attorney Jeff Shepard and Administrator Vivian West on 11/22/2013.</p> <p>Status Report of Attorney Jeff Shepard filed on 2/21/14 states he has been unable to contact the Administrator about the Notice of Status Hearing. He has mailed by regular and certified mail, return receipt requested to all known addresses but both letters came back undeliverable. The attorney states he has called the phone number given to him by Pipkin Detective Agency, however the phone numbers are out of service.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR</u> First and Final Account filed 07/08/14 and set for hearing on 08/12/14</p> |
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| | | |
| Cont. from 022814, 041014, 061214 | | |
| Aff.Sub.Wit. | | |
| Verified | | |
| Inventory | | |
| PTC | | |
| Not.Cred. | | |
| Notice of Hrg | | |
| Aff.Mail | | |
| Aff.Pub. | | |
| Sp.Ntc. | | |
| Pers.Serv. | | |
| Conf. Screen | | |
| Letters | | |
| Duties/Supp | | |
| Objections | | |
| Video Receipt | | |
| CI Report | | |
| 9202 | | |
| Order | | |
| Aff. Posting | | |
| Status Rpt | | |
| UCCJEA | | |
| Citation | | |
| FTB Notice | | |
| | <p>Reviewed by: JF</p> <p>Reviewed on: 07/29/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1A – Baker-Melton</p> | |

Notice of Motion and Motion to be Relieved as Counsel

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|---|--|--|
| DOD: 5/23/2005 | JEFF S. SHEPARD , attorney for Administrator, VIVIAN WEST, is Petitioner. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 06/12/14 Minute Order from 06/12/14 states: No appearances. Matter continued to 07/31/14. Jeff Shepard is ordered to be personally present on 07/31/14.</p> <p>1. Need <i>Notice of Hearing</i> and proof of service of <i>Notice of Hearing</i> on Vivian West.</p> |
| | VIVIAN WEST was appointed Administrator on 08/23/05 without bond. | |
| Cont. from 041014, 061214 | Letters were issued on 08/24/05. | |
| <input type="checkbox"/> Aff.Sub.Wit. | Inventory & Appraisal showing the value of the estate at \$190,700.00 was filed 12/12/05. | |
| <input checked="" type="checkbox"/> Verified | Petitioner states that Vivian West has ceased all contact with his office. All correspondence and telephone calls have been ignored. Petitioner states that he has sent numerous letters to Ms. West regarding her duties as the personal representative of her mother's estate, but none of the letters have been acknowledged and the most recent letters have been returned as undeliverable. Petitioner states that he cannot continue as attorney for Vivian West due to her lack of cooperation and failure to perform her duties as administrator of the estate. | |
| <input type="checkbox"/> Inventory | | |
| <input type="checkbox"/> PTC | | |
| <input type="checkbox"/> Not.Cred. | | |
| <input type="checkbox"/> Notice of Hrg | x | |
| <input checked="" type="checkbox"/> Aff.Mail | w/ | |
| <input type="checkbox"/> Aff.Pub. | | |
| <input type="checkbox"/> Sp.Ntc. | | |
| <input type="checkbox"/> Pers.Serv. | | |
| <input type="checkbox"/> Conf. Screen | | |
| <input type="checkbox"/> Letters | | |
| <input type="checkbox"/> Duties/Supp | | |
| <input type="checkbox"/> Objections | | |
| <input type="checkbox"/> Video Receipt | | |
| <input type="checkbox"/> CI Report | | |
| <input type="checkbox"/> 9202 | | |
| <input checked="" type="checkbox"/> Order | Proof of Service filed 04/04/14 indicates that the Notice of Motion and Motion to be Relieved as Counsel and Declaration in Support of Attorney's Motion to be Relieved as Counsel – Civil was mailed to the Administrator at 3 different addresses. | |
| <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: 07/29/14 |
| | | Updates: |
| | | Recommendation: |
| | | File 1B – Baker-Melton |

(1) First and Final Report of Personal Representative, (2) Petition for Final Distribution and (3) Confirmation of Ownership of Real Property on Waiver of Accounting

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|---|--|---|
| DOD: 7-1-12 | GEORGE P. PAPPAS , Executor with Full IAEA without bond, is Petitioner. | NEEDS/PROBLEMS/COMMENTS: |
| | Accounting is waived. | <p>1. Petitioner requests that the Court authorize attorney fees for this estate in “a reasonable amount agreed upon by the attorneys and the trustee.” The Court cannot authorize an amount higher than the statutory rate, which is \$3,511.12 per Probate Code §10810. An agreement for an amount higher than that is void. Probate Code §10813. If extraordinary compensation is requested, the request must comply with applicable law, Cal. Rules of Court 7.703, and Local Rule 7.18.</p> <p>Therefore, at this time, the Court can authorize compensation up to \$3,511.12 only in connection with this estate.</p> <p>2. Need order.</p> |
| | I&A: \$87,778.00 | |
| | POH: Decedent's undivided 1/6 interest in certain real property APN 065-020-55S valued at \$41,667.00 | |
| <input type="checkbox"/> Aff.Sub.Wit. | Executor: Waived | |
| <input checked="" type="checkbox"/> Verified | Attorney: Because there are no cash assets in the estate, Petitioner requests that attorney fees for services in this estate be paid from the Philon P. Pappas 2005 Revocable Trust, which is the sole beneficiary of the estate, in a reasonable amount agreed upon by the attorneys and the trustee. | |
| <input checked="" type="checkbox"/> Inventory | Distribution pursuant to Decedent's will: | |
| <input checked="" type="checkbox"/> PTC | George P. Pappas, Trustee of the Philon P. Pappas 2005 Revocable Trust: Entire estate consisting of Decedent's undivided 1/6 interest in certain real property APN 065-020-55S valued at \$41,667.00 | |
| <input checked="" type="checkbox"/> Not.Cred. | In addition: Petitioner states it was believed that certain real property was owned 100% by Pappas Family Farms I, a California general partnership, which was recently converted to Pappas Family Farms I, LP, a California limited partnership. Following his death, a sale was negotiated with a prospective buyer; however, it was then discovered that the Decedent had retained title to a portion of the real property. Petitioner was appointed Special Administrator in order to facilitate the sale. At this time, the sale of certain property has taken place and a portion of the real property known as 019-040-10 remains. See Petition for details. Therefore, Petitioner also requests that the real property known as APN 019-040-10 and 019-040-07, and any proceeds from the sale of any portion of such real property, be confirmed as being owned by Pappas Family Farms I, LP, a California Limited Partnership. | |
| <input checked="" type="checkbox"/> Notice of Hrg | | |
| <input checked="" 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 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 type="checkbox"/> Order | | |
| <input type="checkbox"/> Aff. Posting | | |
| <input type="checkbox"/> Status Rpt | | |
| <input type="checkbox"/> UCCJEA | | |
| <input type="checkbox"/> Citation | | |
| <input checked="" type="checkbox"/> FTB Notice | | |

Reviewed by: skc
Reviewed on: 7-29-14
Updates:
Recommendation:
File 2 – Pappas

(1) First and Final Report of Administration, (2) Petition for Statutory Commissions and Fees to Executor and Attorney and for (3) Final Distribution on Waivers of Accounting

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|--|---|----------------------------------|
| DOD: 12/21/2013 | JENNIFER EARLE , Executor, is petitioner. | NEEDS/PROBLEMS/COMMENTS: |
| | Accounting is waived | |
| | I & A - \$332,515.69 | |
| | POH - \$307,333.80 | |
| Cont. from | Executor - \$9,650.31 | |
| <input type="checkbox"/> Aff.Sub.Wit. | (Statutory) | |
| <input checked="" type="checkbox"/> Verified | Attorney - \$9,650.31 | |
| <input checked="" type="checkbox"/> Inventory | (Statutory) | |
| <input type="checkbox"/> PTC | Closing - \$5,000 | |
| <input type="checkbox"/> Not.Cred. | (Taxes) | |
| <input checked="" type="checkbox"/> Notice of Hrg | Distribution, pursuant to decedent's will and assignments of interest, is to: | |
| <input checked="" type="checkbox"/> Aff.Mail | Paul F. Carr Memorial Art Scholarship Fund, Selma High School, Selma California - \$8,000.00 | |
| <input type="checkbox"/> Aff.Pub. | Steven M. Carr - \$178,384.28, man's yellow gold wedding band, ladies yellow and white gold diamond engagement ring, real property located in Kern County. | |
| <input type="checkbox"/> Sp.Ntc. | Cheryl Fraser, \$59,444.76 | |
| <input type="checkbox"/> Pers.Serv. | Jack Fraser, \$59,444.76 | |
| <input type="checkbox"/> Conf. Screen | | |
| <input type="checkbox"/> Letters 02/14/2014 | | |
| <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 | | |
| | | Reviewed by: LV |
| | | Reviewed on: 07/29/2014 |
| | | Updates: |
| | | Recommendation: Submitted |
| | | File 3 – Carr |

4 Wesley P. Crombie (Def Succ)

Case No.

14CEPR00458

Atty Shepard, Jeff S. (for William Crombie – Petitioner – Son)

Petition to Determine Succession to Real Property (Prob. C. 13151)

| | | |
|--|---|----------------------------------|
| DOD: 06/20/2013 | WILLIAM CROMBIE , son, is petitioner. | NEEDS/PROBLEMS/COMMENTS: |
| | 40 days since DOD | |
| | No other proceedings | |
| Cont. from 070314 | | |
| <input type="checkbox"/> Aff.Sub.Wit. | I & A – \$73,100.00 | |
| <input checked="" type="checkbox"/> Verified | | |
| <input checked="" type="checkbox"/> Inventory | Will dated: 08/07/2001 devises one half interest in the home to Lonnie Crombie. | |
| <input type="checkbox"/> PTC | | |
| <input type="checkbox"/> Not.Cred. | | |
| <input checked="" type="checkbox"/> Notice of Hrg | Petitioner requests Court determination that decedent's ½ interest in real property located at 13143 S. Marsh, Caruthers Ca. pass to William Crombie pursuant to decedent's will. | |
| <input checked="" type="checkbox"/> Aff.Mail | w/ | |
| <input type="checkbox"/> Aff.Pub. | | |
| <input type="checkbox"/> Sp.Ntc. | | |
| <input type="checkbox"/> Pers.Serv. | | |
| <input type="checkbox"/> Conf. Screen | | |
| <input type="checkbox"/> Letters | | |
| <input type="checkbox"/> Duties/Supp | | |
| <input type="checkbox"/> Objections | | |
| <input type="checkbox"/> Video Receipt | | |
| <input type="checkbox"/> CI Report | | |
| <input type="checkbox"/> 9202 | | |
| <input checked="" type="checkbox"/> Order | | |
| <input type="checkbox"/> Aff. Posting | | |
| <input type="checkbox"/> Status Rpt | | |
| <input type="checkbox"/> UCCJEA | | |
| <input type="checkbox"/> Citation | | |
| <input type="checkbox"/> FTB Notice | | |
| | | Reviewed by: LV |
| | | Reviewed on: 07/29/2014 |
| | | Updates: |
| | | Recommendation: Submitted |
| | | File 4 - Crombie |

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| DOD: 11/09/2013 | ALAN W. LOWE , son is petitioner and requests appointment as Administrator without bond. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Duties and Liabilities of Personal Representative, Mandatory Judicial Council Form DE-147. 2. Need Confidential Supplement to Duties & Liabilities of Personal Representative, Mandatory Judicial Council Form DE-147S. 3. Need Order. 4. Need Letters. <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Thursday, 01/08/2014 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Thursday, 10/01/2015 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p> <p>Reviewed by: LV</p> <p>Reviewed on: 07/29/2014</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 5 – Lowe</p> |
| | Sole heir waives bond | |
| | Full IAEA – o.k. | |
| Cont. from | Decedent died intestate | |
| <input type="checkbox"/> Aff.Sub.Wit. | Residence: Fresno | |
| <input checked="" type="checkbox"/> Verified | Publication: The Fresno Bee | |
| <input type="checkbox"/> Inventory | | |
| <input type="checkbox"/> PTC | | |
| <input type="checkbox"/> Not.Cred. | | |
| <input checked="" type="checkbox"/> Notice of Hrg | Estimated Value of the Estate: | |
| <input checked="" type="checkbox"/> Aff.Mail | Personal property - \$5,000.00 | |
| <input checked="" type="checkbox"/> Aff.Pub. | Real property - \$100,000.00 | |
| | Total - \$105,000.00 | |
| <input type="checkbox"/> Sp.Ntc. | Probate Referee: Steven Diebert | |
| <input type="checkbox"/> Pers.Serv. | | |
| <input type="checkbox"/> Conf. Screen | | |
| <input type="checkbox"/> Letters | X | |
| <input type="checkbox"/> Duties/Supp | X | |
| <input type="checkbox"/> Objections | | |
| <input type="checkbox"/> Video Receipt | | |
| <input type="checkbox"/> CI Report | | |
| <input type="checkbox"/> 9202 | | |
| <input type="checkbox"/> Order | X | |
| <input type="checkbox"/> Aff. Posting | | |
| <input type="checkbox"/> Status Rpt | | |
| <input type="checkbox"/> UCCJEA | | |
| <input type="checkbox"/> Citation | | |
| <input type="checkbox"/> FTB Notice | | |

| | | |
|--|---|--|
| DOD: 10/14/2013 | ALAN W. LOWE , brother is petitioner and requests appointment as Administrator without bond. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>5. #8 of the petition lists mother, Stella A. Lowe, who is deceased however does not list a father. Need more information.</p> <p>6. Need Duties and Liabilities of Personal Representative, Mandatory Judicial Council Form DE-147.</p> <p>7. Need Confidential Supplement to Duties & Liabilities of Personal Representative, Mandatory Judicial Council Form DE-147S.</p> <p>8. Need Order.</p> <p>9. Need Letters.</p> <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Thursday, 01/08/2014 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Thursday, 10/01/2015 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p> <p>Reviewed by: LV</p> <p>Reviewed on: 07/29/2014</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 6 – Lowe</p> |
| | Petitioner waives bond | |
| Cont. from | Full IAEA – o.k. | |
| <input type="checkbox"/> Aff.Sub.Wit. | Decedent died intestate | |
| <input checked="" type="checkbox"/> Verified | Residence: Fresno | |
| <input type="checkbox"/> Inventory | Publication: The Fresno Bee | |
| <input type="checkbox"/> PTC | | |
| <input type="checkbox"/> Not.Cred. | Estimated Value of the Estate: | |
| <input checked="" type="checkbox"/> Notice of Hrg | Personal property - \$200,000.00 | |
| <input checked="" type="checkbox"/> Aff.Mail | Real property - \$33,000.00 | |
| <input checked="" type="checkbox"/> Aff.Pub. | Total - \$233,000.00 | |
| <input type="checkbox"/> Sp.Ntc. | Probate Referee: Rick Smith | |
| <input type="checkbox"/> Pers.Serv. | | |
| <input type="checkbox"/> Conf. Screen | | |
| <input type="checkbox"/> Letters | X | |
| <input type="checkbox"/> Duties/Supp | X | |
| <input type="checkbox"/> Objections | | |
| <input type="checkbox"/> Video Receipt | | |
| <input type="checkbox"/> CI Report | | |
| <input type="checkbox"/> 9202 | | |
| <input type="checkbox"/> Order | X | |
| <input type="checkbox"/> Aff. Posting | | |
| <input type="checkbox"/> Status Rpt | | |
| <input type="checkbox"/> UCCJEA | | |
| <input type="checkbox"/> Citation | | |
| <input type="checkbox"/> FTB Notice | | |

Petition to Determine Succession to Real Property (Prob. C. 13151)

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| DOD: 9-25-97 | MARY CEPEDA, ALFREDO MORENO, JR., and ESPERANZA BALLADEROS , adult daughters and son of the decedent, are Petitioners. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need date of death of the decedent's deceased spouse. Local Rule 7.1.1.D.</p> <p>Note: If the spouse died after this decedent, distribution as requested may not be appropriate.</p> |
| | 40 days since DOD | |
| <input type="checkbox"/> Aff.Sub.Wit. | No other proceedings | |
| <input checked="" type="checkbox"/> Verified | I&A: \$55,000.00 (Decedent's 100% separate property interest in real property in Parlier) | |
| <input checked="" type="checkbox"/> Inventory | Decedent died intestate | |
| <input type="checkbox"/> PTC | Petitioners request Court determination that the decedent's 100% separate property interest in the real property in Parlier passes to them pursuant to intestate succession. | |
| <input type="checkbox"/> Not.Cred. | | |
| <input checked="" type="checkbox"/> Notice of Hrg | | |
| <input checked="" type="checkbox"/> Aff.Mail | w | |
| <input type="checkbox"/> Aff.Pub. | | |
| <input type="checkbox"/> Sp.Ntc. | | |
| <input type="checkbox"/> Pers.Serv. | | |
| <input type="checkbox"/> Conf. Screen | | |
| <input type="checkbox"/> Letters | | |
| <input type="checkbox"/> Duties/Supp | | |
| <input type="checkbox"/> Objections | | |
| <input type="checkbox"/> Video Receipt | | |
| <input type="checkbox"/> CI Report | | |
| <input type="checkbox"/> 9202 | | |
| <input 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: skc |
| | | Reviewed on: 7-29-14 |
| | | Updates: |
| | | Recommendation: |
| | | File 8 – Moreno |

9 Glenda Allison (Estate)

Case No. 02CEPR00788

Atty Diener, Tanlyn Gail (pro per former Executor)

Atty Kruthers, Heather (for Administrator, Public Administrator)

Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for Failure to File a First Account or Petition for Final Distribution

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| DOD: 4/28/2002 | TANLYN G. DIENER was appointed as Executor with full IAEA authority and without bond on 11/19/2002. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need inventory and appraisal, first account, petition for final distribution</p> |
| | Letters issued on 11/19/2002. | |
| Cont. from 013114, 050214 | Inventory and appraisal was due April 2003. | |
| Aff.Sub.Wit. | First account or petition for final distribution was due December 2003. | |
| Verified | Notice of Status Hearing was mailed to Tanyn Diener on 11/15/13. | |
| Inventory | Minute order dated 1/31/14 states the Court on its own motion removes Tanlyn G. Diener as the executor and appoints the Public Administrator as the personal representative. The Public Administrator is directed to take whatever actions are necessary. | |
| PTC | Letters issued to the Public Administrator on 2/13/14. | |
| Not.Cred. | Status Report filed on 7/29/14 states Senior Probate Assistant Susan Banuelos researched the Court file and discovered only one asset, which is the IRA at American Express. She tried to contact the executor without success. Ms. Banuelos will be contacting American Express to learn more about the asset. In order to allow time to further investigate this mater, the Public Administrator respectfully requests the next status hearing be set no sooner than 90 days from the date of this status hearing. | |
| Notice of Hrg | | |
| Aff.Mail | | |
| Aff.Pub. | | |
| Sp.Ntc. | | |
| Pers.Serv. | | |
| Conf. Screen | | |
| Letters | | |
| Duties/Supp | | |
| Objections | | |
| Video Receipt | | |
| CI Report | | |
| 9202 | | |
| Order | | |
| Aff. Posting | | |
| Status Rpt | | |
| UCCJEA | | |
| Citation | | |
| FTB Notice | | |
| | | |
| | | Reviewed on: 7/29/14 |
| | | Updates: |
| | | Recommendation: |
| | | File 9 – Allison |

Notice of Status Hearing Re: Failure to File a First Account or Petition for Final Distribution

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|-----------------------------------|---|--|
| DOD: 11/25/07 | <p>MARGIE GFELLER, Spouse, was appointed as Executor without IAEA authority and without bond on 03/18/08. Letters were issued on 05/13/08.</p> <p>Petition for Authority to Administer Estate without Court Supervision filed 06/02/08. Order Granting Authority To Administer Estate Without Court Supervision was filed 07/10/08. Letters Testamentary with Full IAEA Authority were issued on 07/14/08.</p> <p>Inventory & Appraisal, partial no. 1 - \$210,000.00</p> <p>Inventory & Appraisal, partial no. 2 - \$835,000.00</p> <p>Notice of Status Hearing filed 10/31/13 set this matter for status regarding failure to file a First Account and/or Petition for Final Distribution. Clerk's Certificate of Mailing states that the Notice of Status Hearing was mailed to Joanne Sanoian on 10/31/13.</p> <p>Status Hearing Report filed 01/02/14 states: it is anticipated that the First and Final Account and Report and Petition for Distribution will be filed within 60 days.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 05/02/14 Minute Order from 05/02/14 states: Mr. Garland is appearing specially for the Office of Joanne Sanoian. Counsel informs the Court that the second partial inventory may have been the final.</p> <p>As of 07/29/14, nothing further has been filed in this matter:</p> <ol style="list-style-type: none"> 1. Need Final Inventory & Appraisal. 2. Need Accounting/Report of Administrator and Petition for Final Distribution. |
| Cont. from 010314, 030714, 050214 | | |
| Aff.Sub.Wit. | | |
| Verified | | |
| Inventory | | |
| PTC | | |
| Not.Cred. | | |
| Notice of Hrg | | |
| Aff.Mail | | |
| Aff.Pub. | | |
| Sp.Ntc. | | |
| Pers.Serv. | | |
| Conf. Screen | | |
| Letters | | |
| Duties/Supp | | |
| Objections | | |
| Video Receipt | | |
| CI Report | | |
| 9202 | | |
| Order | | |
| Aff. Posting | | |
| Status Rpt | | |
| UCCJEA | | |
| Citation | | |
| FTB Notice | | |
| | Reviewed by: JF | |
| | Reviewed on: 07/29/14 | |
| | Updates: | |
| | Recommendation: | |
| | File 10 – Gfeller | |

Probate Status Hearing Re: Failure to File a Petition for Final Distribution

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| DOD: 12/12/2006 | QUEEN E. JEFFERSON , spouse, (DOD 12/1/2013) was appointed Administrator with Full IAEA authority with Bond of \$195,000.00 on 7/17/2008. Letters issued on 9/8/2008 . | NEEDS/PROBLEMS/COMMENTS: |
| | | |
| | | |
| Cont. from 041814, 062014 | Pursuant to Probate Code § 8800(b) , Final Inventory and Appraisal was filed on 8/7/2012, showing an estate value of \$245,700.00 . | Page 11B is the Petition for Letters of Successor Administration filed by LAURA HAMILTON and CARRIE L. JEFFERSON . |
| Aff.Sub.Wit. | | |
| Verified | Pursuant to Probate Code § 12200 , first account and/or petition for final distribution was due 9/8/2009 . | |
| Inventory | | |
| PTC | | |
| Not.Cred. | Notice of Status Hearing filed 2/14/2014 set this status hearing on 4/18/2014 for failure to file the inventory and appraisal and first account and/or petition for final distribution. | Continued from 4/18/2014. |
| Notice of Hrg | | The following issue remains: |
| Aff.Mail | | 1. Need first |
| Aff.Pub. | Clerk's Certificate of Mailing filed 2/14/2014 shows the notice was mailed to Attorney Fanucchi on 2/14/2014. | account and/or |
| Sp.Ntc. | | petition for final |
| Pers.Serv. | | distribution; or |
| Conf. Screen | Notes for background from the last Status Hearings: | verified Status |
| Letters | <ul style="list-style-type: none"> Status Report filed 6/19/2014 states: WANDA FOSTER, who is the daughter of Queen Esther Jefferson, the deceased Administratrix, and is the step-daughter of the Decedent, has met with counsel regarding the filing of a <i>Petition for Probate</i> on her behalf; Counsel's paralegal has not yet had an opportunity to complete those papers for signing; Counsel will attempt to have the documents ready for signature and filing within the next 3 weeks. | Report and |
| Duties/Supp | | proof of service |
| Objections | <ul style="list-style-type: none"> Status Report filed 4/14/2014 states: The Administratrix of the estate died on 12/1/2013, and a <i>Notice of Death of Administratrix</i> was filed on 2/26/2014, when counsel was advised of her death; a <i>Petition for Final Distribution</i> had been prepared in September 2012, but the Administratrix had not executed the <i>Petition</i> as of the time of her death; WANDA FOSTER, daughter of the Administratrix and step-daughter of the Decedent, has expressed her desire to petition as Administratrix of the estate to bring it to a close; it is anticipated that the <i>Petition</i> will be ready for filing in the next 6 weeks; an extension of 60 days is requested for preparation of the probate documents, execution and filing. | of notice of the |
| Video Receipt | | Status Hearing |
| CI Report | | pursuant to |
| 9202 | | Local Rule 7.5(B). |
| Order | | Note: Proof of Bond filed 9/8/2008 in the sum of \$195,000.00 is issued to QUEEN E. JEFFERSON ; based upon her being deceased, the bond must be issued to a successor administrator. |
| Aff. Posting | | |
| Status Rpt | X | Reviewed by: LEG |
| UCCJEA | | Reviewed on: 7/29/14 |
| Citation | | Updates: |
| FTB Notice | | Recommendation: |
| | | File 11A – Jefferson |

Pro Per Hamilton, Laura (Pro Per Petitioner, daughter)
 Pro Per Jefferson, Carrie L. (Pro Per Petitioner, daughter)

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

| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|---------------|---|---|--------------------------|--------------|--|-------------------------------------|----------|--|--------------------------|-----------|--|--------------------------|-----|--|--------------------------|-----------|--|-------------------------------------|---------------|--|--------------------------|----------|---|--------------------------|----------|---|--------------------------|---------|--|--------------------------|------------|---|--------------------------|--------------|--|-------------------------------------|---------|--|-------------------------------------|-------------|------------|--------------------------|------------|--|--------------------------|---------------|--|--------------------------|-----------|--|--------------------------|------|--|-------------------------------------|-------|--|--------------------------|--------------|--|--------------------------|------------|--|--------------------------|--------|--|--------------------------|----------|--|--------------------------|
| DOD: 12/12/2006 | | <p>LAURA HAMILTON and CARRIE L. JEFFERSON, daughters, are Petitioners and request appointment as Successor Co-Administrators without bond.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Item 2(d) is incomplete re: bond, and Item 3(d)(3) states all heirs waive bond; however, no waivers of bond are attached to the <i>Petition</i>. Bond is required in the sum of \$195,000.00 pursuant to Probate Code § 8480 et seq. Need bond to be posted by the Petitioners, or waivers of bond from all beneficiaries of the estate pursuant to Probate Code § 8481(a)(1).</p> <p>~Please see additional page~</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>Cont. from</p> <table border="1"> <tr> <td><input type="checkbox"/></td> <td>Aff.Sub.Wit.</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Verified</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Inventory</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>PTC</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Not.Cred.</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Notice of Hrg</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Aff.Mail</td> <td>?</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Aff.Pub.</td> <td>X</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Sp.Ntc.</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Pers.Serv.</td> <td>?</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Conf. Screen</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Letters</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Duties/Supp</td> <td>Need supp.</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Objections</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Video Receipt</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>CI Report</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>9202</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Order</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Aff. Posting</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Status Rpt</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>UCCJEA</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Citation</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>FTB Notice</td> <td></td> </tr> </table> | | | | <input type="checkbox"/> | Aff.Sub.Wit. | | <input checked="" type="checkbox"/> | Verified | | <input type="checkbox"/> | Inventory | | <input type="checkbox"/> | PTC | | <input type="checkbox"/> | Not.Cred. | | <input checked="" type="checkbox"/> | Notice of Hrg | | <input type="checkbox"/> | Aff.Mail | ? | <input type="checkbox"/> | Aff.Pub. | X | <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 | Need 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"/> |
| <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 type="checkbox"/> | Aff.Mail | ? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Aff.Pub. | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <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 | Need 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>Full IAEA — ?</p> <p>Decedent died intestate.</p> <p>Residence — Fresno Publication — NEED</p> <p>Estimated value of the Estate: Real property - \$195,000.00 <hr/> Total - \$195,000.00</p> <p>Probate Referee: Rick Smith* *Corrected Final Inventory and Appraisal filed 7/15/2008 by Petitioners was completed by Steven Diebert; however, the correct Referee is <u>Rick Smith</u> for the instant case number. A Final Inventory and Appraisal was filed 8/7/2012 by Administrator Queen Jefferson that was completed by Rick Smith.</p> <p>Petitioners state they are seeking successor administration of their father's estate because Queen Esther, whom this Court appointed as Administrator in 2008, passed away on or about 12/5/2013, they believe. Therefore, Petitioners request that they be appointed successor administrators of their father's estate, especially after learning of the poor condition of the estate while under the management of LAWANDA FOSTER, who is the daughter of their father's deceased wife, and who is currently living in their father's home that needs a lot of work done.</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>Reviewed by: LEG</p> <p>Reviewed on: 7/29/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11B – Jefferson</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

NEEDS/PROBLEMS/COMMENTS, continued:

2. *Proof of Service* of the *Notice of Hearing* filed 6/19/2014 does not show that Attorney Fanucchi as attorney of record in this matter was served notice. Additionally, it appears Petitioners intend by the *Proof of Service* filed 6/19/2014 to indicate the persons listed were personally served; however, the *Proof of Service* form they filed is intended for use with mailed service of notice and does not contain the form and substance of information required to indicate notice given by personal service.
3. **Need Affidavit of Publication pursuant to Probate Code §§ 8120 – 8124, and Local Rule 7.9.**
4. Need *Confidential Supplement to Duties and Liabilities of Personal Representative* form, pursuant to Local Rule 7.10.1 and Probate Code § 8404 to be filed for both of the Petitioners.
5. Item 5(a) of the *Petition* is incomplete as to (3) or (4) re: registered domestic partner, and (7) or (8) re: issue of a predeceased child.

Note: If *Petition* is granted, Court will set status hearings as follows:

- **Thursday, August 28, 2014 at 9:00 a.m. in Dept. 303 for filing proof of bond;**
- **Thursday, January 8, 2015 at 9:00 a.m. in Dept. 303 for filing of inventory and appraisal; and**
- **Wednesday, September 30, 2015 at 9:00 a.m. in Dept. 303 for filing of the petition for final distribution.**

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.

12 Haylie Vuori, Trystyn Vuori, and McKayla Vuori (GUARD/P)

Case No. 08CEPR00522

Atty Silvey, Donna Ann (Pro Per – Maternal Great-Aunt – Petitioner)
 Atty Fields, Keith (Pro Per – Maternal Grandfather)
 Atty Fields, Valerie (Pro Per – Maternal Step-Grandmother)

Petition for Appointment of Temporary Guardianship of the Person

| | | | | |
|-------------------------------------|---------------|--|--|---|
| | | GENERAL HEARING 9-23-14 | NEEDS/PROBLEMS/COMMENTS: | |
| | | A Petition to terminate the existing guardianship for Haylie only filed by the parents is also set for hearing 9-23-14 | <u>Note:</u> This petition pertains to the minor Haylie (16) only. | |
| | | DONNA SILVEY , Maternal Great-Aunt, is Petitioner. | <u>Note:</u> A Restraining Order dated 8-2-11 in 11CEFL04342 (Valerie Fields v. Tiffany Vuori) protects the guardians and the children from mother (expires 8-2-14). | |
| <input type="checkbox"/> | Aff.Sub.Wit. | KEITH FIELDS and VALERIE FIELDS , maternal grandfather and step-grandmother, were appointed co-guardians of all three minors on 7-24-08. Father: ADAM VUORI - Consents and waives notice Mother: TIFFANY VUORI - Consents and waives notice Paternal grandfather: Oliver Vuori Paternal grandmother: Jeanette Tate Petitioner states the child has been enrolled in a military type discipline camp that starts 7-19-14. She does not want to go, but is being forced by the current guardians. The child tells Petitioner of verbal and mental abuse. She was also taken by the guardians to CPS to remove guardianship and be placed in foster care. She informed them that her aunt (Petitioner) in Salinas would care for her. Petitioner requests the Court excuse her from giving notice to the current guardians to prevent Haylie from having to go to Grisley Academy and Petitioner needs to get her enrolled in school. She also wants to prevent her from having to go back to an environment of abuse and drama. Guardians Keith and Valerie Fields filed four declarations on 7-29-14. See Page 2. | <u>Note:</u> On 7-3-14, Tiffany Vuori (Mother) filed a Petition for Visitation regarding all three minors that is set for hearing on 8-7-14 with reference to the expiration date of the restraining order noted above. <u>Note:</u> Petitioner resides in Salinas, CA. 1. Need proof of personal service of Notice of Hearing at least five court days prior to the hearing per Probate Code §2250(e) on: - <u>Keith Fields (Guardian)</u> - <u>Valerie Fields (Guardian)</u> - <u>Haylie Fields (Minor, age 16)</u> 2. Petitioner's confidential screening form is missing Attachment 4. | |
| <input checked="" type="checkbox"/> | Verified | | | |
| <input type="checkbox"/> | Inventory | | | |
| <input type="checkbox"/> | PTC | | | |
| <input type="checkbox"/> | Not.Cred. | | | |
| <input type="checkbox"/> | Notice of Hrg | | | X |
| <input type="checkbox"/> | Aff.Mail | | | |
| <input type="checkbox"/> | Aff.Pub. | | | |
| <input type="checkbox"/> | Sp.Ntc. | | | |
| <input type="checkbox"/> | Pers.Serv. | | | X |
| <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 checked="" type="checkbox"/> | UCCJEA | | | |
| <input type="checkbox"/> | Citation | | | |
| <input type="checkbox"/> | FTB Notice | | | |
| | | | Reviewed by: skc | |
| | | | Reviewed on: 7-29-14 | |
| | | | Updates: | |
| | | | Recommendation: | |
| | | | File 12 – Vuori | |

Guardians Keith and Valerie Fields filed four declarations on 7-29-14:

Declaration #1 attaches:

- Grizzly Youth Academy Application Letter
- Letter from Chief Hile – Haylie's counselor
- Letter from Haylie During Enrollment Process
- Medical doctor's recommendation for Haylie to attend

Declaration #2 attaches:

- Grizzly Youth Academy Handbook with description of missions and policy of program

Declaration #3 attaches:

- Guardians' written behavioral history of Haylie

Declaration #4 attaches:

- Letters from family and friends with perspective of Haylie's behavior
- Emails from teachers and coaches in response to behavior issues they are having with Haylie

See declarations for details.

Petition for Termination of Guardianship

| | | |
|--|---|---|
| Age: 8 years | ANTHONY BAUTISTA , father, is petitioner. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Petition is incomplete. It does not state why terminating the guardianship is in the best interest of the minor. Petition does not include the names and current addresses of the guardian, mother, paternal grandfather and maternal grandparents. Need Notice of Hearing. Need proof of service of the Notice of Hearing on: <ol style="list-style-type: none"> Mother Guardian Paternal grandfather Maternal grandparents |
| | MARIA BAUTISTA , paternal grandmother, was appointed guardian on 5/3/2010. | |
| | | |
| Cont. from | | |
| <input type="checkbox"/> Aff.Sub.Wit. | Court Investigator, Jennifer Daniel's Report filed on 7/25/14 | |
| <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 checked="" 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: KT |
| | | Reviewed on: 7/29/14 |
| | | Updates: |
| | | Recommendation: |
| | | File 13 – Bautista |

14 Carribbean Thomas & Camora Foster (GUARD/P) Case No. 10CEPR01078

Pro Per Thomas, Shacola (Pro Per Petitioner, maternal aunt)
 Pro Per Johnson, Helen (Pro Per Petitioner, maternal great aunt)

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

| | | |
|---|---|--|
| Carribbean Age: 15 yrs | NO TEMPORARY REQUESTED | NEEDS/PROBLEMS/COMMENTS: |
| Camora Age: 7 yrs | SHACOLA THOMAS , maternal aunt, and HELEN JOHNSON , maternal great aunt, are Petitioners. | 1. Need <i>Notice of Hearing</i> and proof of personal service of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian</i> , or <i>Consent to Appointment of Guardian and Waiver of Notice</i> , or a <i>Declaration of Due Diligence</i> , for: <ul style="list-style-type: none"> • Patricia Thomas, mother; • Craig Foster, Sr., father, if <i>Court does not find due diligence</i>; • Carribbean Thomas, proposed ward (age 15). |
| | GLORIA PENNINGTON , maternal great-grandmother, was appointed Guardian of the children on 5/16/2011. | |
| Cont. from | Father: CRAIG FOSTER, SR. ; <i>Declaration of Due Diligence</i> filed 5/30/2014. | 2. Need proof of service by mail of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian</i> , or <i>Consent to Appointment of Guardian and Waiver of Notice</i> , or a <i>Declaration of Due Diligence</i> , for: <ul style="list-style-type: none"> • Paternal grandfather; • Marcus Thomas, maternal grandfather; • Allene Turner, maternal grandmother. |
| <input type="checkbox"/> Aff.Sub.Wit. | Mother: PATRICIA THOMAS | |
| <input checked="" type="checkbox"/> Verified | Paternal grandfather: Unknown Paternal grandmother: <i>Deceased</i> . | |
| <input type="checkbox"/> Inventory | Maternal grandfather: Marcus Thomas Maternal grandmother: Allene Turner | |
| <input type="checkbox"/> PTC | Petitioners state the Guardian, Gloria Pennington, passed away on 1/5/2014, and Petitioner Shacola Thomas has guardianship of the children's brother, Craig Foster [<i>appointed on 6/27/2011</i>], and she would like to have guardianship of the siblings so that they can remain together in one household until the mother is capable of caring for the children. Petitioners state the children have already been living with Petitioner Shacola Thomas. Petitioners state the mother uses drugs and has serious mental health issues and housing issues. | |
| <input type="checkbox"/> Not.Cred. | Court Investigator Dina Calvillo's Report was filed on 7/23/2014. | |
| <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 checked="" type="checkbox"/> Conf. Screen | | |
| <input type="checkbox"/> Aff. Posting | | |
| <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 checked="" type="checkbox"/> Order | | |
| <input checked="" type="checkbox"/> Letters | | |
| <input type="checkbox"/> Status Rpt | | |
| <input checked="" type="checkbox"/> UCCJEA | | |
| <input type="checkbox"/> Citation | | |
| <input type="checkbox"/> FTB Notice | | |
| | | Reviewed by: LEG |
| | | Reviewed on: 7/29/14 |
| | | Updates: |
| | | Recommendation: |
| | | File 14 – Thomas & Foster |

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

| | | |
|--|---|---|
| Age: 27 years | TEMPORARY EXPIRES 7/31/14 | NEEDS/PROBLEMS/COMMENTS: Court Investigator Advised Rights on 6/20/14. Continued from 7/1/14. Minute order states petitioner is directed to submit a declaration that includes the terms of the settlement reached with regards to the car accident. The declaration is to include information as to when the proceeds are anticipated. 1. Notice of Hearing was not served with a copy of the Petition as required. 2. Need citation. 3. Need proof of personal service of the Citation on the proposed conservatee. 4. Need declaration regarding the settlement. 5. If Conservatorship of the Estate is granted bond will be required pursuant to Probate Code §2320. Note: Examiner is unable to calculate the amount of bond without more information as to the value of the estate. |
| | SHEILA R. SCOTT, mother, is petitioner and requests appointment as conservator of the person with medical consent powers and conservator of the estate without bond. | |
| Cont. from 070114 | Estimated value of the estate: \$0 | |
| <input type="checkbox"/> Aff.Sub.Wit. | Declaration of Stephen Grossman, M.D., 5/22/14 supports the request for medical consent powers. | |
| <input checked="" type="checkbox"/> Verified | Petitioner states the proposed conservatee cannot breathe or eat on her own. She cannot talk or move her limbs. She cannot care for herself in any way. She cannot make financial decisions on her own behalf. | |
| <input type="checkbox"/> Inventory | Court Investigator Jennifer Young's Report filed on 6/25/14. | |
| <input type="checkbox"/> PTC | Supplemental Report of Court Investigator Jennifer Young filed on 6/27/14. | |
| <input type="checkbox"/> Not.Cred. | Probate Referee: Rick Smith (if conservatorship of the estate is granted) | |
| <input checked="" type="checkbox"/> Notice of Hrg | | |
| <input checked="" type="checkbox"/> Aff.Mail | | |
| <input type="checkbox"/> Aff.Pub. | | |
| <input type="checkbox"/> Sp.Ntc. | | |
| <input type="checkbox"/> Pers.Serv. | X | |
| <input checked="" type="checkbox"/> Conf. Screen | | |
| <input checked="" type="checkbox"/> Letters | | |
| <input checked="" type="checkbox"/> Duties/Supp | | |
| <input type="checkbox"/> Objections | | |
| <input checked="" type="checkbox"/> Video Receipt | | |
| <input checked="" type="checkbox"/> CI Report | | |
| <input type="checkbox"/> 9202 | | |
| <input checked="" type="checkbox"/> Order | | |
| <input type="checkbox"/> Aff. Posting | | |
| <input type="checkbox"/> Status Rpt | | |
| <input type="checkbox"/> UCCJEA | | |
| <input type="checkbox"/> Citation | X | |
| <input type="checkbox"/> FTB Notice | | |
| | | Reviewed by: KT |
| | | Reviewed on: 7/29/14 |
| | | Updates: |
| | | Recommendation: |
| | | File 15 - Foster |

Note: If the conservatorship of the estate is granted, status hearings will be set as follows:

- **Wednesday, November 12, 2014** at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.
- **Wednesday, September 30, 2015** at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.

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.

Petition to Determine Succession to Real Property (Prob. C. 13151)

| | | |
|----------------------|--|---|
| DOD: 4-30-14 | MONICA MELINDA ROMERO, relationship not stated, is Petitioner. | NEEDS/PROBLEMS/COMMENTS: 1. <u>Need amended petition.</u> The petition is incomplete at #9 through #17 and does not contain all required information and attachments. Deficiencies are too numerous to list individually. 2. This petition was filed with a fee waiver; however, if granted, assets valued at \$75,000.00 will be distributed. Therefore, the filing fee of \$435.00 is due prior to any order for distribution. |
| | 40 days since DOD | |
| | No other proceedings | |
| Aff.Sub.Wit. | | |
| Verified | I&A: \$75,000.00 (real property located at 3744 E. Clay Ave., Fresno) (Note: Only the address and APN is provided. No legal description is provided, and the I&A does not state the decedent's interest in the real property.) | |
| Inventory | | |
| PTC | | |
| Not.Cred. | | |
| Notice of Hrg | | |
| Aff.Mail | Decedent died intestate | |
| Aff.Pub. | | |
| Sp.Ntc. | Petitioner requests ????? (Petition is mostly blank.) | |
| 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: 7-29-14 |
| | | Updates: |
| | | Recommendation: |
| | | File 16 – Valdez |