



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.

2 Adam Flavio Carbajal (GUARD/P)

Case No. 10CEPR00008

Guardian: Alfredo Garcia (pro per – maternal grandfather)

Guardian: Maria Alvarez-Garcia (pro per – maternal grandmother)

Petitioner: Alfonso Delgado, JR (pro per – maternal uncle)

Petition for Appointment of Guardian of the Person

		<p>ALFONSO DELGADO, JR., maternal uncle, is petitioner and requests appointment as Co-Guardian.</p> <p>MARIA ALVAREZ-GARCIA, maternal grandmother and ALFREDO GARCIA, maternal grandfather, were appointed as co-guardians on 5/3/10.</p> <p>Please see petition for details.</p> <p>Court Investigator Report filed on 8/4/16.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need proof of personal service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence for: <ol style="list-style-type: none"> a. Maria Alvarez-Garcia (guardian) b. Alfredo Garcia (guardian) c. Flavio Carbajal (father) d. Adam Carbajal (minor, age 12) 2. Need proof of service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence for: <ol style="list-style-type: none"> a. Paternal grandfather b. Angelica (Norato per minute order dated 5/3/10) paternal grandmother. 3. Need consent from the current guardians Maria Alvarado-Garcia and Alfredo Garcia to the appointment of Alfonso Delgado as co-guardian. 	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input type="checkbox"/>	Aff.Mail			X
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			W/
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<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: KT		
		Reviewed on: 8/5/16		
		Updates:		
		Recommendation:		
		File 2- Carbajal		

3 Angelina Delgado & Kaylyne Lenard (GUARD/P)

Case No. 11CEPR00559

Guardian: Alfredo Garcia (pro per – maternal grandfather)
 Guardian: Maria Alvarez-Garcia (pro per – maternal grandmother)
 Petitioner: Alfonso Delgado, JR (pro per – maternal uncle)

Petition for Appointment of Guardian of the Person

		ALFONSO DELGADO, JR. , maternal uncle, is petitioner and requests appointment as Co-Guardian.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>4. Need Notice of Hearing.</p> <p>5. Need proof of personal service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence for:</p> <ul style="list-style-type: none"> e. Maria Alvarez-Garcia (guardian) f. Alfredo Garcia (guardian) g. Kevin Lenard (father) – unless court dispenses with notice. h. Rosario G. Delgado (mother) – unless court dispenses with notice. <p>6. Need proof of service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence for:</p> <ul style="list-style-type: none"> c. Paternal grandparents <p>7. Need consent from the current guardians Maria Alvarado-Garcia and Alfredo Garcia to the appointment of Alfonso Delgado as co-guardian.</p>
		MARIA ALVAREZ-GARCIA , maternal grandmother and ALFREDO GARCIA , maternal grandfather, were appointed as co-guardians on 8/30/11.	
		Please see petition for details.	
		Court Investigator Report filed on 8/2/16	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	X	
<input type="checkbox"/>	Aff.Mail	X	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	X	
<input checked="" type="checkbox"/>	Conf. Screen		
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<input checked="" type="checkbox"/>	Duties/Supp		
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<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: KT	
		Reviewed on: 8/5/16	
		Updates:	
		Recommendation:	
		File 3- Delgado/ Lenard	

Attorney Steven M. Matlak (for Bruce Bickel, Trustee)

**Petition for Settlement of Second Account Current and Report of Trustee;
and for Approval Attorney's Fees and Costs**

		BRUCE BICKEL , Trustee, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Statement of Trustee fees paid as itemized in <i>Exhibit D</i> does not but should contain a grand total of all hours expended and of all fees paid to the Trustee during the instant account period.</p> <p>Note: If the <i>Petition</i> is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Wednesday, September 12, 2016 at 9:00 a.m. in Department 303, for the filing of the additional \$175,000.00 bond. Wednesday, July 11, 2018 at 9:00 a.m. in Department 303, for the filing of the third account. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p> <p>Reviewed by: LEG</p> <p>Reviewed on: 8/4/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 4- Kubota</p>
		Account period: 5/1/2014 – 4/30/2016	
		Accounting - \$367,561.94	
		Beginning POH - \$186,003.73	
		Ending POH - \$306,356.96	
		(\$172,433.08 cash)	
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	2620		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		<p>True Link Debit Card Account: 5/1/2014 – 4/30/2016</p> <p>Accounting - \$550.00</p> <p>Beginning POH - \$ 0.00</p> <p>Ending POH - \$437.90</p> <p>(debit card managed and monitored by Petitioner to be used for outings by the Right At Home caregivers for the Beneficiary;)</p> <p>Trustee - Total not specified (already paid; unspecified total of hours @ \$60/hr to \$150/hr; payment authorized up to \$1,000.00 per month; Trustee waives any fees incurred during this account period over the \$1,000.00 per month;)</p> <p>Attorney - \$4,529.00 (for 8.40 hrs of attorney time @ \$210 – 250/hr and 3.60 hrs of paralegal time @ \$95/hr)</p> <p>Costs - \$200.00 (filing fee)</p> <p>Current bond - \$258,061.45 (insufficient; request to increase bond by an additional \$175,000.00;)</p> <p>Petitioner prays for an Order that:</p> <ol style="list-style-type: none"> The Second Account of Trustee be settled, allowed, and approved as filed, and all the acts and transactions of Petitioner as set forth in it or relating to matters set forth in it, be ratified, approved and confirmed; Petitioner be authorized to pay his attorney in the amount of \$4,529.00 plus costs of \$200.00; and Petitioner file an additional \$175,000.00 bond. 	

5 Alvino L. Medina aka Alvino Medina aka Albino Medina (Estate)

Case No. 14CEPR00866

Attorney Bagdasarian, Gary G. (for Administrator Dolores Medina)

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

DOD: 12/12/74	DOLORES MEDINA , Daughter and Administrator with Limited IAEA without bond, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. It appears one heir was omitted from the Notice of Hearing. The Court may require continuance for proper notice to Alvino Medina, Jr., son, or waiver of notice.</p> <p>Note: A status hearing re the filing of the first or final account was continued to Thurs., August 25, 2016.</p> <p>If granted, the Court will add a status hearing re receipt for blocked account on that date, Thursday, August 25, 2016.</p>
	Sale price: \$25,000.00 Overbid: \$26,750.00	
	Reappraisal: \$25,000.00	
	Property: 35 E. San Joaquin Street, Fresno, CA 93706	
	Buyers: Paul Van and Kathy Van, as joint tenants with right of survivorship. (See Bid filed 7/21/16.)	
	Broker: 6% or \$1,500.00 to Realty Concepts, Ltd.	
	Petitioner requests the Court order proceeds to be deposited to a blocked account at California Bank & Trust.	
	See petition and agreement re terms of sale, escrow.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail		
<input checked="" type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input 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 checked="" type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: skc
		Reviewed on: 8/4/16
		Updates:
		Recommendation:
		File 5- Medina

Status RE: Filing of the First Account/Petition for Final Distribution

DOD: 1/13/15		<p>ROBERT SEAN BAKER, Son, was appointed Administrator without IAEA and without bond on 6/8/15.</p> <p>At the hearing on 6/8/15, the Court set this status hearing for the filing of the first account or petition for final distribution.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need first account or petition for final distribution pursuant to Probate Code §12200 or written status report pursuant to Local Rule 7.5.</p>
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: skc			
Reviewed on: 8/4/16			
Updates:			
Recommendation:			
File 7- Richardson			

Status RE: Filing Proof of Additional Bond

		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Additional Rider to Conservator's Bond filed 7/7/16
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input type="checkbox"/>	Pers.Serv.	
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: skc
		Reviewed on: 8/4/16
		Updates:
		Recommendation:
		File 8- Walters

Probate Status Hearing RE: Filing of the Inventory and Appraisal

DOD: 4/19/14	ANN ELIZABETH VAN DEUSEN BEACH	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Status Report was not verified. Probate Code §1021</p>
	was appointed Executor with full IAEA Authority and without bond on 7/30/15.	
	Letters issued on 7/30/15.	
Cont. from 011316	Minute Order dated 7/30/15 set this status hearing for the filing of the Inventory and appraisal.	
Aff.Sub.Wit.		
Verified	X	
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Status Report filed on 7/28/16 states the only asset of this probate are parcels of real property located in the State of Connecticut which are subject to Ancillary Probate. Mr. Koligian states he has been unable to obtain updated information from the probate attorney in Connecticut as to when the ancillary probate would be complete.	
<input checked="" type="checkbox"/> Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections	Attorney Koligian requests a continued status hearing no sooner than March 2017.	
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 8/4/16
		Updates:
		Recommendation:
		File 9- Beach

Petitioner: Efrain Palma (Pro per – Maternal step-grandfather)

Petition for Appointment of Guardian of the Person (as to LEO MORENO only)

		<u>TEMPORARY EXPIRES 8/9/2016</u>	NEEDS/PROBLEMS/COMMENTS:
		EFRAIN PALMA , maternal step-grandfather, is petitioner	Petition is as to <u>LEO MORENO</u> only.
		Court Investigator report filed 5/31/2016.	Minute order dated 5/31/2016 from temporary hearing orders no unsupervised visitation to either parent.
Cont. from 053116, 070516			Minute order dated 7/5/2016 continued matter to 8/9/2016. The following issues still exist:
<input type="checkbox"/>	Aff.Sub.Wit.		1. Item 9 of petition did not list the reason for guardianship for Leo; it instead listed the reason for guardianship for minor's sibling, <i>Leann</i> . A verified declaration was filed by petitioner on 6/1/2016, stating the reason for guardianship, but there was no proof of service attached. Need proof of service of declaration <u>or</u> consent to guardianship, for:
<input checked="" type="checkbox"/>	Verified		a. Elida Moreno (paternal grandmother)
<input type="checkbox"/>	Inventory	<i>See petition for details.</i>	Note: A proof of service of <i>Notice of Hearing</i> filed 7/6/2016 indicates a general guardianship petition was served, but not the declaration listed in item 1, above.
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		Reviewed by: SEF
<input type="checkbox"/>	Status Rpt		Reviewed on: 8/1/2016
<input checked="" type="checkbox"/>	UCCJEA		Updates:
<input type="checkbox"/>	Citation		Recommendation:
<input type="checkbox"/>	FTB Notice		File 11- Moreno

Status RE: Filing of the Inventory and Appraisal

Age:			NEEDS/PROBLEMS/COMMENTS:
DOD:			
Cont. from			
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		Final I&A filed 6/27/16	
		<u>OFF CALENDAR</u>	
		Reviewed by: skc	
		Reviewed on: 8/4/16	
		Updates:	
		Recommendation:	
		File 12- Deelen	

Status RE: Filing of the Inventory and Appraisal

DOD: 8/27/15	ROBERT ROBLEDO , Son, was appointed Administrator with Limited IAEA with bond of \$13,100.00 on 3/8/16.	NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Final I&A filed 8/5/16
	Bond was filed 4/27/16 and Letters issued 5/6/16.	
	At the hearing on 3/8/16, the Court set this status hearing for the filing of the Inventory and Appraisal.	
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 8/4/16
		Updates: 8/5/16
		Recommendation:
		File 13- Robledo

14 Levi DeLaCruz, Rubi Aguirre (GUARD/P)

Case No. 16CEPR00341

Petitioner: Sylvia Carrisalez (Pro per – Maternal grandmother)

Objector: Cesar Aguirre (Pro per – Father of Rubi)

Petition for Appointment of Guardian of the Person

		<u>TEMPORARY EXPIRES 8/9/2016</u>	NEEDS/PROBLEMS/COMMENTS:	
		SYLVIA CARRISALEZ , maternal grandmother, is petitioner	<p>Competing petition re: <u>RUBI</u> only, filed by Alfredo Aguirre and Juanita Aguirre (Rubi's paternal grandparents) set for hearing 9/12/2016.</p> <p>Note: Levi De La Cruz (ward) turned 18 years of age on 7/19/2016. Therefore, temporary guardianship of the person terminated as to Levi, by operation of law.</p> <p>Minute order dated 4/11/2016 orders Cesar Aguirre (Rubi's father) shall have supervised visitation.</p> <p>Minute order dated 7/5/2016 continued matter to 8/9/2016 and states visitation as previously ordered. Guardian is not to show up late. Examiner notes given in court. The following issues still exist:</p> <p style="text-align: center;">See additional page.</p>	
		Objections by Cesar Aguirre (Rubi's father) filed on 4/14/2016.		
		Declarations by Cesar Aguirre (Rubi's father) filed 4/15/2016.		
		Court Investigator report filed 5/23/2016.		
		Declaration filed 7/1/2016 by Cesar Aguirre (father).		
		See petition for details.		
Cont. from 060716, 070516				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/o
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			w/
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input checked="" type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input checked="" type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input checked="" type="checkbox"/>	ICWA			
		Reviewed by: SEF		
		Reviewed on: 8/1/2016		
		Updates:		
		Recommendation:		
		File 14- DeLaCruz & Aguirre		

NEEDS/PROBLEMS/COMMENTS, *continued*:

Petitioner:

1. Proof of service of *Notice of Hearing* filed 6/24/2016 does not indicate it was served with a copy of the petition. Need proof of service of *Notice of Hearing* with copy of petition at least 15 days prior to hearing or consents and waivers of notice or declarations of due diligence for:
 - a. Alfredo Aguirre (Rubi's paternal grandfather) – *filed consent to their competing petition re: Rubi*
 - b. Juanita Aguirre (Rubi's paternal grandmother) – *filed consent to their competing petition re: Rubi*

Objector:

1. Need proof of service of declaration filed 7/1/2016, on petitioners.

Petition for Appointment of Guardian of the Person

	See petition for details.	NEEDS/PROBLEMS/COMMENTS:
		<u>Minute Order 6/28/16</u> : Mother is to give petitioner the grandmother's Facebook information for noticing.
		<u>Note</u> : An additional Declaration of Due Diligence was filed 6/26/16 re Maternal Grandmother Angelina Flores (Soto), containing Facebook message and text message screenshots and an additional declaration re telephone conversations.
		The following issue remains noted for reference:
		1. If diligence is not found, need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 on maternal grandmother Angelina Valdez Soto, <u>or</u> consent and waiver of notice <u>or</u> further diligence.
		Reviewed by: skc
		Reviewed on: 8/4/16
		Updates:
		Recommendation:
		File 15- Lopez
Cont. from 062816		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	W	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> Clearances		
<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		

16 Justin Marbry, Samantha Marbry, Charlotte Marbry (GUARD/P)
Case No. 16CEPR00449

Petitioner Ward, Amie Michelle (Pro Per – Paternal Aunt)
Petition for Appointment of Guardian of the Person

		<u>TEMPORARY EXPIRES 08/09/2016</u>	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Petition is as to Justin Marbry only.</p> <p>Note: Hearing on the General Petition for Guardianship of the minors Samantha Marbry, and Charlotte Marbry, filed by Mary Parfenova, was continued to 08/18/2016.</p> <p>Minute Order of 06/28/2016: Mr. and Ms. Marbry gave contact information to deputy for the court investigator.</p> <p>1. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian for:</p> <ul style="list-style-type: none"> • Michael Marbry, Sr. (Paternal Grandfather) – Unless the Court dispenses with notice. <p>Note: Declaration of Due Diligence filed 05/02/2016.</p>
		AMIE WARD , paternal aunt, is Petitioner.	
		<u>Please see file for details</u>	
Cont. from 062816			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	w/	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed by: LV	
		Reviewed on: 08/05/2016	
		Updates:	
		Recommendation:	
		File 16- Marby	

17 The C & S Tsitouris Family Trust dated August 22, 2009 Case No. 16CEPR00512

Attorney **Dostalova-Busick, Alice M. (for Petitioner Sandra Tsitouris)**

Petition for Instructions and to Confirm the Revocability and Amendability of the C & S Tsitouris Family Trust

Constantine Tsitouris DOD: 7/24/15	<p>SANDRA TSITOURIS, Sole Surviving Trust Maker, Trustee and Beneficiary, is Petitioner.</p> <p>Petitioner states she and her spouse Constantine Tsitouris created the C&S Tsitouris Family Trust on 8/22/09 (Trust Makers). There have been no modifications or amendments to date. See Exhibit A. Upon his death, Petitioner became the sole trustee and beneficiary.</p> <p>In order to properly administer the trust, Petitioner requests the Court confirm that the trust is a single trust for the benefit of the surviving Trust Maker and is fully revocable and amendable by the sole surviving Trust Maker.</p> <p>Petitioner states she has personal knowledge of the Trust Makers' joint intention in creating the trust. In particular, they created the trust to avoid the necessity of probate following each of their deaths. As such, they created a revocable trust which they believed was for their benefit during each of their lifetimes and would facilitate the transfer of assets without probate. Thus, it was the Trust Makers' understanding and intent that the trust assets would continue in a single or survivor's trust for the sole benefit of the surviving Trust Maker during his or her lifetime.</p> <p>Upon Constantine's death on 7/24/15, Petitioner sought the assistance of legal counsel to administer the trust. It was at this time that she discovered that the trust did not provide any administrative instructions following the first death. This drafter's error occurred because the Trust Makers created the document themselves without advice of legal counsel or other professionals. Nevertheless, taking the trust instrument as a whole, it is clear on its face that the Trust Makers created a trust that was amendable and revocable by each of them during each of their lifetimes, and that the trust assets were to remain in a single survivor's trust for the sole benefit of the surviving Trust Maker.</p> <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 7/12/16: Counsel will submit declaration from petitioner.</u></p> <p><u>Note: Supplemental Petition was filed 7/22/16. See additional pages.</u></p> <p>1. If the petition is granted as amended in the supplement, need revised proposed order.</p>
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<input type="checkbox"/> Aff.Sub.Wit.		
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		Reviewed by: skc
		Reviewed on: 8/4/16
		Updates:
		Recommendation:
		File 17- Tsitouris

Section Three of the Trust states: "THIRD: RESERVATION AND GRANT OF RIGHTS AND PRIVILEGES. The Trust Makers specifically reserve and grant the following rights and privileges: A. During the lifetime of the Trust Makers, this trust may be altered, amended, or revoked in whole or in part...." (Trust Agreement, p. 1).

The express language of the trust states that during their lifetimes, and Sandra is still living, the trust may be altered, amended, or revoked. Moreover, the law states that unless a trust is expressly made irrevocable by the trust instrument, the trust is revocable by the settlor (Probate Code §15400). That is the case here where there is no express statement in the trust document that any portion becomes irrevocable at the first Trust Maker's death.

Thus, based on the foregoing, Sandra is requesting the Court to confirm that the Trust is revocable and amendable by her as the surviving Trust Maker, and is for her sole benefit during her lifetime, as was contemplated and intended by the Trust Makers when the Trust was created.

The law recognizes the Court's equitable power to address a drafter's error and reform the instrument so as to conform to the settlor's intentions. See petition for citation. Here, the Trust Makers created a Trust document. They did not seek assistance of professionals and as a result the typical administrative provisions found in trusts following the first Trust Maker's death are missing. Petitioner is now requesting the Court's assistance to correct the drafting error and confirm the Trust Makers' intent that the trust is a single, survivor's trust that is for Petitioner's sole benefit during her lifetime, and that she retains all of the rights and powers to amend and revoke the trust.

Petitioner is the sole beneficiary during her lifetime. Following her death, Sandra and Constantine's children are contingent remainder beneficiaries. Petitioner lists the names and addresses of the persons entitled to notice as: Ambra and Jeffrey Wright of Magalia, CA (Petitioner's daughter and son-in-law), and Petitioner's step-sons Eric Tsitouris, of Port Orchard, WA, Joshua Tsitouris, incarcerated in San Luis, AZ, and Ethan Tsitouris, a minor, c/o Mary Jo Sterling, in Flagstaff, AZ.

Petitioner prays for an order:

1. Confirming that the trust is a single, survivor's trust;
2. Confirming that the trust is for Petitioner's sole benefit during her lifetime;
3. Confirming that Petitioner has the power to amend, revoke, or alter the trust in whole or in part;
and
4. For such other orders that the Court may deem proper.

Note: See below re amended prayer as set forth in the Supplement filed 7/22/16.

Note: Declaration of Alice M. Dostalova-Busick filed 7/8/16 states venue is proper in Fresno because the trust account is principally located and managed with a financial advisor in Fresno. Additionally, Petitioner is in the process of relocating to Fresno, CA. Thus, the day to day activity of the trust is carried on by the trustee from Fresno.

SEE ADDITIONAL PAGES

Supplemental Petition filed 7/22/16 states Sandra, as additional Trust Maker, has personal knowledge of the Trust Makers joint intention in creating the trust. In particular, Constantine and Sandra created the trust to avoid the necessity of probate following each of their deaths. As such, they created a revocable trust which they believed was for their benefit during each of their lifetimes and would facilitate transfer of assets without probate. Thus, at the first death, it was their understanding and intention that the trust assets would continue in a single or survivor's trust for the sole benefit of the surviving Trust Maker during his or her lifetime.

Although the Trust Makers' joint intent was that the trust be amendable and revocable by the Trust Makers during each of their lifetimes, Petitioner understands the Court's concerns regarding the specific distributions set out in Section FOURTH, subsection 1, and the ability of Petitioner to delete those provisions if the Court granted the petition. As such, Petitioner requests the Court to permit Petitioner to make the specific distributions identified in Subsection E to address the Court's concerns as follows:

- a. \$5,00.00 to Eric D. Tsitouris
- b. \$5,000.00 to Joshua R. Tsitouris
- c. \$5,000.00 to Mary Jo Sterling, mother of Ethan Tsitouris
- d. The real property located at 918 E. Palm Drive, Hanford, and 812 Homewood Drive, Yuba City, are not assets of the estate and were sold prior to Constantine's death.

With the Court's approval of the specific distributions to the descendants of Constantine Tsitouris, there is no prejudice that could result from the Court's granting of the petition. In fact, the payment of the specific distributions to Constantine's sons is more than fair and just, as it is entirely possible that by the time of Sandra's death, the assets would be depleted on her health, education, care, support, maintenance, and comfort in accordance with her accustomed manner of living as permitted under Section FOURTH, Subsection C.

Thus, based on the foregoing, Sandra is requesting the Court confirm that the trust is revocable and amendable by her as the Trust Maker, and is for her sole benefit during her lifetime, as was contemplated and intended by the Trust Makers when the trust was created.

Petitioner prays for an order as follows:

1. Authorizing Petitioner to make the specific gifts as set forth above in full satisfaction of the specific gifts set forth in the trust;
2. Confirming that upon receipt of the distributions, such beneficiaries' interests have been satisfied in full and they are no longer beneficiaries or interested persons for purposes of this trust;
3. Confirming that the trust is a single survivor's trust;
4. Confirming that the trust is for Petitioner's sole benefit during her lifetime;
5. Confirming that Petitioner has the power to amend, revoke, or alter the trust in whole or in part; and
6. For such other orders that the Court may deem proper.

Note: Supplement was served with notice of hearing on all interested parties on 7/22/16.

Petition for Appointment of Guardian of the Person

		<u>TEMPORARY EXPIRES 8/9/2016</u>	NEEDS/PROBLEMS/COMMENTS:	
		KAELEE M. ATTEBERRY , half-sister, is petitioner (and resides in El Paso, Texas)	<p>Minute order dated 7/19/2016 continued matter to 8/9/2016. Examiner notes given in court. The following issues still exist:</p> <p>1. Need proof of service at least 15 days before hearing of <i>Notice of Hearing</i> with copy of petition <u>or</u> consents and waivers of notice <u>or</u> declarations of due diligence for:</p> <ul style="list-style-type: none"> a. Paternal grandfather b. Maternal grandfather c. Brian James Kelly, Jr. (half-brother – adult) d. Olivia Dianne Kenney (half-sister – adult) <p>Please see related page 18B re: petition to fix minor's residence outside of California.</p>	
		Court Investigator report filed 7/12/2016.		
Conf. from 071916		<i>See petition for details.</i>		
<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 type="checkbox"/>	Notice of Hrg			x
<input type="checkbox"/>	Aff.Mail			x
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<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: SEF	
			Reviewed on: 8/1/2016	
			Updates:	
			Recommendation:	
			File 18A- Hawkins	

Petition for Fix Residence Outside the State of California

		<u>TEMPORARY EXPIRES 8/9/2016</u>	NEEDS/PROBLEMS/COMMENTS:
		<p>KAELEE M. ATTEBERRY, half-sister, is petitioner (and resides in El Paso, Texas).</p> <p><i>See petition for details.</i></p>	<p>Minute order dated 7/19/2016 continued matter to 8/9/2016. Examiner notes given in court. The following issues still exist:</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of service of the <i>Notice of Hearing</i> along with a copy of the petition at least 15 days before the hearing for: <ol style="list-style-type: none"> a. Bryan James Kelly (father) b. Emaleerose Hawkins (ward) c. Cynthia Diane Hawkins Snyder (maternal grandmother) 3. Petition is not dated at signature line on page 2 of petition. <p>Note: Pursuant to Probate Code 2352 the guardian must serve a <i>Pre-Move Notice of Proposed Change of Personal Residence of the Ward</i> (Judicial Council form GC-079) on the minors' parents at least 15 days prior to the proposed move and then file the original with the court. After the move the guardian must serve a <i>Post-Move Notice of Change of Residence of the Ward</i> (Judicial Council form GC-080) on the minors' parents within 30 days of the move and then file the original with the court. Copies of said forms are in the file to give to petitioner.</p> <p style="text-align: center;">See additional page.</p>
Cont. from 071916			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
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			Reviewed by: SEF
			Reviewed on: 8/1/2016
			Updates:
			Recommendation:
			File 18B- Hawkins

NEEDS/PROBLEMS/COMMENTS, *continued*:

Note: If the petition is granted, a status hearing will be set as follows:

- **Tuesday, January 3, 2017** at 9:00 am in Department 303 for the proof of the establishment of a guardianship or its equivalent in Texas.

Pursuant to Local Rule 7.5, if the required documents are filed 10 days prior to the hearing on the matter, the status hearing will come off calendar and no appearance will be required.

Probate of Will and for Letters Testamentary: Authorization to Administer Under the IAEA

DOD: 1/5/16		ERIC VELASQUEZ , Son and Named Executor without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Full IAEA – need publication	1. Need Publication pursuant to Probate Code §8120 and Local Rule 7.9. Note: If granted, the Court will set status hearings as follows: <ul style="list-style-type: none"> • Tuesday, January 10, 2017 for filing the Inventory and Appraisal • Tuesday, October 10, 2017 for filing the first account or petition for final distribution
Cont. from		Will dated 1/4/16	
<input type="checkbox"/>	Aff.Sub.Wit.	S/P	
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
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<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: skc
			Reviewed on: 8/4/16
			Updates:
			Recommendation:
			File 19- Velasquez

Petition to Determine Succession to Real Property

DOD: 12/15/12		<p>SAMUEL HERNANDEZ, ALMA E. WELLS, ELUID HERNANDEZ, children, and BATYA HERNANDEZ, and MATEA HERNANDEZ, successors to post-deceased son DAVID HERNANDEZ, are Petitioners.</p> <p>40 days since DOD</p> <p>No other proceedings</p> <p>I&A: \$135,000.00 (real property located at 1881 S. Karen Ave., in Fresno)</p> <p>Will dated 9/9/94 devises the decedent's estate to her children who survive her, or the issue of children who predeceased her.</p> <p>Petitioners request Court determination that the decedent's property passes to them as follows:</p> <ul style="list-style-type: none"> • Samuel Hernandez: 25% • Alma E. Wells: 25% • Eluid Hernnadez: 25% • Batya Hernnadez: 12.5% • Matea Hernandez: 12.5% 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. The petition is blank at #9a(3) and (4) re registered domestic partner. Need clarification. 2. The petition is blank at #9a(7) and (8) re issue of predeceased child. Need clarification. 3. Attachment #11 does not state the decedent's interest in the real property. Need clarification. 4. The decedent's son David Hernandez survived the decedent, but died 2/25/13. <p>Pursuant to Probate Code §11801, the share of David Hernandez must be distributed to his estate or personal representative. (Because real property is being distributed, his heirs cannot petition in his place.)</p> <p>Petitioners may wish to petition the Court for appointment of a special administrator of the Estate of David Hernandez for the purpose of joining in this petition and receiving his share, and thereafter his heirs can pass his share to them via another summary proceeding.</p>
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<input type="checkbox"/>	FTB Notice		
		Reviewed by: skc	
		Reviewed on: 8/4/16	
		Updates:	
		Recommendation:	
		File 20- Hernandez	

Petition for Letters of Administration and Authorization to Administer under the IAEA

DOD: 4/29/16		<p>JANETTE ZEMAN, Daughter, is Petitioner and requests appointment as Administrator with Full IAEA without bond.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: The Court will set status hearings as follows:</p> <ul style="list-style-type: none"> • Tuesday, January 10, 2017 for filing the Inventory and Appraisal • Tuesday, October 10, 2017 for filing the first account or petition for final distribution
Cont. from		<p>Petitioner is the sole heir and waives bond.</p>	
	Aff.Sub.Wit.		
✓	Verified	<p>Full IAEA – ok</p>	
	Inventory		
	PTC	<p>Decedent died intestate</p>	
	Not.Cred.		
N/A	Notice of Hrg	<p>Residence: Fresno Publication: Business Journal</p>	
	Aff.Mail		
✓	Aff.Pub.	<p>Estimated value of estate: Personal property: \$181,000.00 Real Property: \$112,000.00 Total: \$293,000.00</p>	
	Sp.Ntc.		
	Pers.Serv.	<p>Probate Referee: Rick Smith</p>	
	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: 8/4/16
			Updates:
			Recommendation: SUBMITTED
			File 21- Wilson

Petition for Probate of Will and for Letters Testamentary, Letters of Administration,
Authorization to Administer under the IAEA

DOD: 5/1/16		<p>STEFANIA GIANNONI, Daughter and named co-executor without bond, is Petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
		<p>Petitioner states the other named co-executor, Sabrina Smith (Castaneda), chooses not to act as executor or personal representative.</p>	<p>1. Need declination to serve by named co-executor Sabrina Castaneda (Smith).</p> <p>2. It appears the decedent's will was redacted via black marker at some date after it was signed to remove his third daughter as co-executor and beneficiary.</p>
<input checked="" type="checkbox"/>	Aff.Sub.Wit.		
	Verified	<p>Full IAEA – ok</p>	<p>The Court may require clarification as to the date of this apparent amendment and/or declaration by the subscribing witnesses as to whether they also witnessed such redaction.</p>
	Inventory		
	PTC	<p>Will dated 3/5/03</p>	<p>The Court may also require declination to serve by Rhonda Peterson as well.</p>
	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	<p>Residence: Fresno Publication: Business Journal</p>	<p>Note: If granted, the Court will set a status hearing for Tuesday, October 10, 2017 for filing the first account or petition for final distribution. (Because the I&A has been filed, no status hearing need be set for its filing.)</p>
<input checked="" type="checkbox"/>	Aff.Mail		
<input checked="" type="checkbox"/>	Aff.Pub.	<p>Estimated value of estate: Real property: \$115,000.00 (\$195,000, encumbered for \$80,000.00)</p>	
	Sp.Ntc.		
	Pers.Serv.	<p>(I&A filed concurrently with petition reflects real property valued at \$195,000.00.)</p>	
	Conf. Screen		
<input checked="" type="checkbox"/>	Letters	<p>Probate Referee: Steven Diebert</p>	
<input checked="" type="checkbox"/>	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 8/4/16
			Updates:
			Recommendation:
			File 22- Giannoni

23 Clarence Wyatt, Clarion Wyatt (GUARD/P) Case No. 16CEPR00779

Petitioner Robinson, Vernishay Marie (Pro Per – Paternal Aunt)

Petition for Appointment of Temporary Guardian of the Person

		<u>GENERAL HEARING 09/26/2016</u>	NEEDS/PROBLEMS/COMMENTS:
		VERNISHAY ROBINSON , paternal aunt, is petitioner.	<ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Temporary Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Clarence Maurice Wyatt, Jr. (Father) • Viginianne M. Mosley (Mother)
		<u>Please see petition for details</u>	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
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<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: LV
			Reviewed on: 08/05/2016
			Updates:
			Recommendation:
			File 23- Wyatt

First and Final Report of Special Administrator of Status of Administration; Waiver of Accounting; and Petition for Allowance of Statutory Attorneys' Compensation; and for Final Distribution.

DOD: 10/8/04		<p>HRANT L. GEORGE, Special Administrator, is petitioner.</p> <p>Leon Y. George and Armen L. George were appointed co-Administrators on 1/25/15. Leon Y. George died on 4/10/15. Armen L. George was removed on 11/30/15.</p> <p>I & A - \$301,457.66 POH - \$179,793.93</p> <p>Administrator - waives Attorney - \$9,024.58</p> <p>Distribution, pursuant to intestate succession is to:</p> <p>Louise K. George - \$701.56, ½ of the stocks and securities, ½ interest in household, furniture, furnishings and personal effects and ½ interest in real property.</p> <p>Armen L. George, as personal representative of the Estate of Leon K. George - \$701.56, ½ of the stocks and securities, ½ interest in household, furniture, furnishings and personal effects and ½ interest in real property.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 8/2/16. Minute order states Counsel represents that he is still waiting for a response from the Franchise Tax Board. He further represents that with regard to the E*Trade Securities, he sent a letter in May, and the response from them was via phone. Court orders Counsel to file a declaration with a copy of said letter attached, and date, time and name of person he spoke to on the phone, no later than noon on 8/3/16. The Court admonishes Counsel with regard to the late-filed Status Report.</p> <ol style="list-style-type: none"> 1. Need Allowance or Rejection of Creditor's Claim for the following claims: <ol style="list-style-type: none"> a. Franchise Tax Board- \$11,714.20 2. Schedule A – Sales of Assets does not include the sales price of the assets sold. Probate Code § 10800 requires any loss on sales to be included in the determination of the statutory fee base therefore the amount the asset was sold for should be included in the Sales of Assets schedule. 3. Petition states between 10/28/04 and 12/31/15 certain securities were sold by E*Trade Securities and the proceeds were applied to satisfy a margin loan secured by said assets. The assets sold include 22,573 shares of Nortel Network Common Stock valued at \$75,168.09 and 19,072 s/hares of Valence Technologies valued at \$63,223.68. Court may require more information regarding said margin loan. <p>Please see additional page</p>
Cont. from 042616, 052416, 062116, 080216			
Aff.Sub.Wit.			
✓ Verified			
✓ Inventory			
✓ PTC			
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✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice	N/A		
Reviewed by: KT			
Reviewed on: 8/4/16			
Updates:			
Recommendation:			
File 24- George			

4. Proposed distribution appears incorrect. The proposed distribution does not appear have accounted for the attorney fees (distribution includes 100% of the assets on hand). In addition, property on hand shows 227.391 shares of Berkshire Focus Fund; however; distributes 256.40 shares (128.197 to each beneficiary).

Attorney Mark S. Poochigian (for Nicholas Chapman and Lucinda Chapman, children)

Petition for Probate of [Lost] Will and for Letters Testamentary with IAEA

DOD: 3/17/2016	NICHOLAS CHAPMAN , son and named Executor without bond, and LUCINDA CHAPMAN , daughter, are Petitioners.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Probate Code § 8223 provides a petition for probate of a lost or destroyed will shall include a written statement of the testamentary words or their substance. If the will is proved, the provisions of the will shall be set forth in the order admitting the will to probate. Pursuant to Probate Code § 8223, need proposed order containing the provisions of the lost Will.</p> <p>Note: If <i>Petition</i> is granted, Court will set Status Hearings as follows:</p> <ul style="list-style-type: none"> • Monday, January 9, 2017 at 9:00 a.m. in Dept. 303 for the filing of the final inventory and appraisal; and • Monday, October 16, 2017 at 9:00 a.m. in Dept. 303 for the filing of the first account and/or petition for final distribution. <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>Reviewed by: LEG</p> <p>Reviewed on: 8/5/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 25- Chapman</p>
Cont. from 080216		
<input checked="" type="checkbox"/> Aff.Sub.Wit.	Full IAEA: OK	
<input checked="" type="checkbox"/> Verified		
Inventory		
PTC	Lost Will Dated: 11/4/1980	
Not.Cred.		
Notice of Hrg	N/A	
Aff.Mail	Residence: Fresno	
<input checked="" type="checkbox"/> Aff.Pub.	Publication: Business Journal	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Estimated value of the Estate:	
<input checked="" type="checkbox"/> Letters	Real property - \$300,000.00	
<input checked="" type="checkbox"/> Duties/Supp	Personal property - \$ 6,000.00	
Objections	Total - \$306,000.00	
Video Receipt	Probate Referee: Rick Smith	
CI Report		
9202		
Order	X	
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		