

Motion - Change of Venue Petition for Transfer

<p>Age: 51</p>	<p>EDITH C. TREVISO, mother, and EDITH W. TREVISO, sister, were appointed as Co-Conservators in 1982.</p> <p>Court Investigator Charlotte Bien filed a Petition for Transfer on 06/30/15 requesting this proceeding be transferred to Orange County because the conservatee has resided there for over 11 years and it is presumed, pursuant to Probate Code § 2215 that transfer of the conservatorship case to the county of residence is in the best interest of the conservatee.</p> <p>Court Investigator further recommends that the fees and costs related to this transfer be waived.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: A Status Hearing will be set as follows:</p> <ul style="list-style-type: none"> • October 5, 2015 for confirmation of receipt of transfer 																																																																									
<p>Cont. from</p> <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:10%;"></td> <td style="width:80%;">Aff.Sub.Wit.</td> <td style="width:10%;"></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Verified</td> <td></td> </tr> <tr> <td></td> <td>Inventory</td> <td></td> </tr> <tr> <td></td> <td>PTC</td> <td></td> </tr> <tr> <td></td> <td>Not.Cred.</td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Notice of Hrg</td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Aff.Mail</td> <td style="text-align: center;">w/</td> </tr> <tr> <td></td> <td>Aff.Pub.</td> <td></td> </tr> <tr> <td></td> <td>Sp.Ntc.</td> <td></td> </tr> <tr> <td></td> <td>Pers.Serv.</td> <td></td> </tr> <tr> <td></td> <td>Conf. Screen</td> <td></td> </tr> <tr> <td></td> <td>Letters</td> <td></td> </tr> <tr> <td></td> <td>Duties/Supp</td> <td></td> </tr> <tr> <td></td> <td>Objections</td> <td></td> </tr> <tr> <td></td> <td>Video Receipt</td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>CI Report</td> <td></td> </tr> <tr> <td></td> <td>9202</td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Order</td> <td></td> </tr> <tr> <td></td> <td>Aff. Posting</td> <td></td> </tr> <tr> <td></td> <td>Status Rpt</td> <td></td> </tr> <tr> <td></td> <td>UCCJEA</td> <td></td> </tr> <tr> <td></td> <td>Citation</td> <td></td> </tr> <tr> <td></td> <td>FTB Notice</td> <td></td> </tr> </table>		Aff.Sub.Wit.		✓	Verified			Inventory			PTC			Not.Cred.		✓	Notice of Hrg		✓	Aff.Mail	w/		Aff.Pub.			Sp.Ntc.			Pers.Serv.			Conf. Screen			Letters			Duties/Supp			Objections			Video Receipt		✓	CI Report			9202		✓	Order			Aff. Posting			Status Rpt			UCCJEA			Citation			FTB Notice		<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td>Reviewed by: JF</td> </tr> <tr> <td>Reviewed on: 08/03/15</td> </tr> <tr> <td>Updates:</td> </tr> <tr> <td>Recommendation:</td> </tr> <tr> <td>File 1 – Treviso</td> </tr> </table>	Reviewed by: JF	Reviewed on: 08/03/15	Updates:	Recommendation:	File 1 – Treviso
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Petitioner Ricky Cruz Perez (Pro Per – Maternal Grandfather – Petitioner)
 Petitioner Cruz Rosenda Perez (Pro Per – Maternal Grandmother – Petitioner)

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

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 7/13/15</p> <ol style="list-style-type: none"> 1. Need UCCJEA (Form GC-120), which provides information regarding the minors' residence history and other pertinent information per Probate Code §§ 1510, 1512. 2. Need Notice of Hearing. 3. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: <ul style="list-style-type: none"> - Todd Carl (Tamara's father) - Paul Joseph Osuna (Paul's father) 4. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: <ul style="list-style-type: none"> - Tamara's Paternal Grandparents - Paul's Paternal Grandparents - Siblings age 12 or older <p>Note: Petitioners list Judy Lyons as the paternal grandmother of both minors, but the minors have different fathers. Need clarification.</p>
Cont. from 071315			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA	X	
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 8/3/15
			Updates:
			Recommendation:
			File 2 – Gonzalez & Perez

Attorney Poochigian, Mark S. (for Petitioner Antonette Gutierrez, Executor)

Second and Final Account and Report of Personal Representative and Petition for its Settlement; For Allowance of Compensation to Personal Representative and Attorneys for Ordinary and Extraordinary Services; and for Final Distribution

DOD: 10/7/2005	ANTONETTE GUTIERREZ , daughter and Executor, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;">Continued to 9/21/2015 Per Attorney Request</p> <p>Page 5 is the related matter of the <i>Erlinda Gutierrez Trust</i>, 11CEPR00097.</p> <ol style="list-style-type: none"> Paragraph 13 of the <i>Petition</i> states a supplement inventory and appraisal will be filed prior to the hearing date showing estate assets of \$135,000.00, which Court records do not show has been filed as of 8/4/2015. Pursuant to Local Rules 7.12.3 and 7.12.4, the Court will not order distribution of real property in undivided interests nor distribution of personal property, such as a money judgment, in undivided interests without the written consent of all distributees. Need written consent to be filed with the Court from: <ul style="list-style-type: none"> Aremi Alanis, Jr., grandson; Brandon Alanis, grandson. Need proposed order pursuant to Local Rule 7.1.1(F) which provides a proposed order shall be submitted with all pleadings that request relief.
Cont. from	Account period: 1/8/2010 – 10/5/2014	
<input type="checkbox"/> Aff.Sub.Wit.	Accounting - \$544,577.34	
<input checked="" type="checkbox"/> Verified	Beginning POH - \$318,607.98	
<input checked="" type="checkbox"/> Inventory	Ending POH - \$401,024.54 (\$179,794.59 is cash)	
<input type="checkbox"/> PTC	Executor (statutory) - \$13,207.12	
<input checked="" type="checkbox"/> Not.Cred.	Executor Reimb. - \$40,397.69 (pursuant to Order Settling Status Report of Personal Representative, Approving Settlement Agreement, and Allowing Attorneys' Fees for Extraordinary Services filed 7/29/2013; breakdown contained in Settlement Agreement and Mutual Release, ¶ 2 and 3, page 2 – 3;)	
<input checked="" type="checkbox"/> Notice of Hrg	Attorney (statutory) - \$13,207.12	
<input checked="" type="checkbox"/> Aff.Mail	Attorney XO - \$40,000.00 (reduced from \$59,372.00; for defense of the estate in Alanis v. Gutierrez Case 07CECG03628 of \$8,574.00; and Renteria v. Gutierrez Case 07CECG03513 of \$50,907.50;)	
<input type="checkbox"/> Aff.Pub.	Costs - \$3,334.96 (filing fees, discovery services, delivery services)	
<input type="checkbox"/> Sp.Ntc.	Closing - \$5,000.00 (for expenses of administration and liabilities)	
<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 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 type="checkbox"/> FTB Notice		

~Please see additional page~

Reviewed by: LEG
Reviewed on: 8/4/15
Updates: 8/6/15
Recommendation:
File 3 – Gutierrez

Petitioner states:

- As Executor, she was required to defend two litigation matters involving the estate: *Alanis v. Gutierrez* Case 07CECG03628, which resolved by summary judgment in favor of the Executor; and *Renteria v. Gutierrez* Case 07CECG03513, in which the Court entered a **\$86,229.95** money judgment in favor of the Decedent's Trust and the *Estate of Erlinda Gutierrez* against **RAYMOND RENTERIA**, Decedent's brother, and **RITA RENTERIA** (represented by Attorney Henry D. Nunez);
- An *Order Determining Construction of Trust Instrument and Instructing Trustee* filed 9/19/2011 in Case 11CEPR00097, *Erlinda Gutierrez Trust*, authorized the Trustee to sell a real property Lot in Reedley, which was later discovered by a title company to be an asset of the Decedent's estate rather than the Trust, such that the Lot is part of the Decedent's estate and would pass under the Decedent's Will at ½ to Petitioner, and ¼ each to Decedent's grandsons, **AREMI ALANIS, JR. (A.J.)** and **BRANDON ALANIS**;
- Petitioner, A.J., and Brandon entered into a *Settlement Agreement and Mutual Release*, approved by the Court on 7/29/2013, which provides for distribution of the Lot from the Estate to A.J. as to an undivided ½ interest and to Brandon as to an undivided ½ interest (*copy of Settlement Agreement attached as Exhibit A*);
- Pursuant to *Order Settling Status Report of Personal Representative, Approving Settlement Agreement, and Allowing Attorneys' Fees for Extraordinary Services* filed 7/29/2013, the Court allowed Petitioner reimbursement of **\$40,397.69** for all expenses she has incurred relating to the Lot (\$13,316.09), and ½ of attorney fees related to Creditor's Claim Litigation (\$27,081.60), which has not been paid.
- **Distribution pursuant to Decedent's Will and Settlement Agreement approved 7/29/2013 is to:**
 - **ANTONETTE GUTIERREZ** – undivided ½ interest in **\$86,229.95** money judgment calculating as **\$43,114.97**;
 - **AREMI ALANIS, JR. (A.J.)** – undivided ¼ interest in **\$86,229.95** money judgment calculating as **\$21,557.49**; and ½ interest in real property on Kingswood Parkway in Reedley;
 -
 - **BRANDON ALANIS**– undivided ¼ interest in **\$86,229.95** money judgment calculating as **\$21,557.49**; and ½ interest in real property on Kingswood Parkway in Reedley.

Notes Re Attorney Fees Paid:

- *Order Settling the First Account* dated 9/14/2011 awarded extraordinary attorney fees and costs totaling **\$53,800.32**, consisting of **\$4,868.87** for costs, **\$5,051.51** for extraordinary services in connection with the objections to the appointment of Antonette Gutierrez as Executor, and **\$43,880.15** in connection with *Alanis v. Gutierrez*.
- *Order Settling Status Report of Personal Representative, Approving Settlement Agreement, and Allowing Attorneys' Fees for Extraordinary Services* filed 7/29/2013 authorized **\$80,000.00** as extraordinary attorney fees and **\$4,901.99** for costs advanced.

Note Re Closing Reserve: Pursuant to Local Rule 7.12.6, Court will set a Status Hearing as follows:

Wednesday, February 10, 2016 at 9:00 a.m. in Dept. 303 for an Informal Accounting of the **\$5,000.00** Closing Reserve.

Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the date listed, the hearing will be taken off calendar and no appearance will be required. **Filing of the informal accounting of closing reserve will not generate a new hearing date.**

Dept. 303, 9:00 a.m. Monday, August 10, 2015

Attorney Poochigian, Mark S. (for Petitioner Antonette Gutierrez, Successor Trustee)

Petition for Determination of Right to Surcharge Beneficiary's Interest, or in the Alternative, Enforce Money Judgment against Trust Beneficiary

DOD: 10/7/2005		<p>ANTONETTE GUTIERREZ, daughter and Successor Trustee, is Petitioner.</p> <p>Petitioner states:</p> <ul style="list-style-type: none"> • Settlor Erlinda Gutierrez created the ERLINDA GUTIERREZ TRUST by Declaration of Trust dated 6/21/2005 (<i>copy attached as Exhibit A</i>); • Trust terms provide that Petitioner shall become sole trustee to fill the vacancy created by Settlor's death; Petitioner is the sole Successor Trustee of the Trust; • Trust is the owner of an interest in real property on Pecan Avenue in Reedley; • On 10/22/2007, RAYMOND RENTERIA [Settlor's brother], individually and as Guardian Ad Litem for RITA RENTERIA, filed an Ownership Action in Case 07CECG03513 alleging that they were the rightful owners of the property; Court concluded that the Renterias failed to establish their ownership; • On 9/6/2012, the Court also entered in the Ownership Action a \$86,229.95 money judgment in favor of the Trust and against Renteria in favor of Petitioner, individually, and as Trustee of the Trust, and as Executor of the <i>Estate of Erlinda Gutierrez</i> in Case 06CEPR00207 (<i>copy of judgment attached as Exhibit C; Court of Appeal upheld Trial Court decision</i>); • Accordingly, the Trust is the rightful owner of the property, and Petitioner, individually, as Trustee of the Trust, and as Executor of the Estate, is a judgment creditor of Renteria; <p align="center">~Please see additional page~</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p align="center">Continued to 9/21/2015 Per Attorney Request</p> <p>Page 3 is the related matter of the Erlinda Gutierrez Estate, 06CEPR00207.</p> <ol style="list-style-type: none"> 1. Need proposed order pursuant to Local Rule 7.1.1 (F) which provides a proposed order shall be submitted with all pleadings that request relief. 	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input 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			X
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p>Reviewed by: LEG</p> <p>Reviewed on: 8/4/15</p> <p>Updates: 8/6/15</p> <p>Recommendation:</p> <p>File 5 – Gutierrez</p>		

Petitioner states, continued:

- *Order Determining Construction of Trust Instrument and Instructing Trustee* filed 9/19/2011 describes the nature of the interests of the parties with respect to the Reedley property under the terms of the Trust; the Court's order finds Renteria is the holder of a legal life estate in the property and is required to *[in brief sum, act as to the residence in a manner that a fee simple owner would normally act; not injure or harm the future interest holders; deliver to Antonette Gutierrez or her successors in interest possession of the residence upon termination of the life tenancy; keep the property in repair, pay taxes and other annual charges];*
- Renteria presently occupies a portion of the residence located on the property and receives rent from leasing the remainder; Renteria has been derelict in his duties as holder of a life estate and has allowed the property to fall into a state of disrepair by failing to perform necessary repairs, neglecting to pay property taxes and insurance, and is therefore causing harm to the future interest held by the person designated to receive the remainder after Renteria's death;
- The Trust provides that the named beneficiaries' interests are not subject to voluntary or involuntary transfer;
- Apart from Renteria's life estate in the property, Petitioner believes he has no assets against which the judgment in favor of the Trust may be enforced, and that the value of Renteria's interest in the property is insufficient to satisfy the **[\$86,229.95]** money judgment entered against him.

Petitioner requests an Order that:

1. Petitioner, as Trustee of the Trust, is entitled to surcharge Renteria's remaining interest to (a) partially satisfy the money judgment entered in Case 07CECG03513, (b) pay for necessary repairs and maintenance on the property, and (c) pay all necessary expenses, including property taxes and insurance;
2. Petitioner is authorized and directed to take possession of the property, to lease the property for its reasonable rental value, collect all rents and profits received from the property, and apply the net income from all of the Trust property to the satisfaction of the **[\$86,229.95]** money judgment] until the judgment is satisfied in full, at which time all of the net income of the Trust shall be paid in convenient installments to Renteria; OR,
3. As an alternative to surcharge of the beneficiary's interest, the Trustee under Code of Civil Procedure § 709.010, shall lease the property for its reasonable rental value, and collect all rents and profits received therefrom and apply such funds to the satisfaction of the **[\$86,229.95]** money judgment]; or shall satisfy the judgment by such means as the Court in its discretion determines are proper, including imposition of a lien on or sale of the judgment debtor's interest, collection of trust income, and liquidation and transfer of trust property; and
4. Petitioner is awarded her attorneys' fees and costs.

See petition for details.			<p>NEEDS/PROBLEMS/ COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing per Probate Code §1460(b)(5) on all relatives: <ul style="list-style-type: none"> - Dwayne A. Drockton (Guardian) - Debra Drockton (Guardian) - Dwayne A. Drockton, II (Father) - Kimberly Peters (Maternal Grandmother) - Siblings of minor age 12 and older
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	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: 8/3/15
			Updates:
			Recommendation:
			File 6 – Drockton

Second Account and Report of Conservator; Petition for Allowance of Fees to Attorney for Conservator

		CHRISTINA TOLMAN , Conservator, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> The Conservatee was originally under a conservatorship in Kentucky. When she moved to California a conservatorship was established here. Petition shows disbursements for attorney fees for the Kentucky Professional Guardians in the total amount of \$1,682.00. Petition states the Kentucky Court previously approved this amount. Need copy of the Kentucky order showing approval of said fees. Petition states that the conservatee is not able to complete an affidavit of voter registration and is not entitled to vote. The court has not made an order stating the conservatee is restricted from voting. In addition, the court investigator report filed on 11/6/14 indicates the conservatee is able to complete an affidavit of voter registration. The order provided disqualifies the conservatee from voting. <p>Note: Petition misstates that the current bond is \$357,984.80. The original bond was filed in the amount of \$38,920.00 on 11/30/12. On 5/16/13 a Surety Rider was filed increasing the bond from \$38,920.00 to \$319,064.80.</p> <p>Reviewed by: KT</p> <p>Reviewed on: 8/4/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7 – Tolman</p>
		Account period: 1/1/14 – 3/31/15	
Cont. from		Accounting - \$308,161.21	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$236,638.72	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$228,408.18	
<input type="checkbox"/>	Inventory	Conservator - not addressed	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Attorney - \$3,987.50	
<input checked="" type="checkbox"/>	Aff.Mail	(14.5 hours @ \$275.00 for preparation of the accounting and court appearances.)	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	Costs (filing fee) - \$435.00	
<input type="checkbox"/>	Conf. Screen	Current bond - \$319,064.80 (sufficient)	
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections	Petitioner prays for an Order:	
<input type="checkbox"/>	Video Receipt	1. Approving, allowing and settling the second account and report;	
<input type="checkbox"/>	CI Report	2. Authorizing payment of attorney fees and costs;	
<input checked="" type="checkbox"/>	2620(c)	3. Order that the conservatee is not able to complete an affidavit of voter registration and is not entitled to vote.	
<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		

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

- **Wednesday, June 21, 2017** at 9:00 a.m. in Department 303, for the filing of the third account.

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.

Second and Final Account and Report of Conservator

DOD: 01/08/15	BROOKE A. CASTLE , Conservator, is Petitioner.		<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Affidavit for Collection or Transfer of Personal Property from Clayton James Stott pursuant to Probate Code § 13100. 2. Need declaration regarding trust pursuant to Local Rule 7.12.5. <p>Note: Pursuant to decedent's will (attached to the Petition as Exhibit "A", the estate should be distributed to the Don Claypool Stott and Patricia Stoll Gregory Stott 1986 Family Declaration of Trust" as amended. Petitioner proposes to distribute to the Patricia Stoll Gregory Stott Survivor's Trust. The Court may require clarification regarding the different trusts.</p>
	Account period: 09/22/14 – 06/22/15		
	Accounting: \$43,607.28		
	Beginning POH: \$20,286.77		
	Ending POH: \$7,928.46		
Cont. from	Conservator: waived		
Aff.Sub.Wit.	Attorney: \$1,250.00 (ok per Local Rule)		
✓ Verified	Petitioner prays for an Order:		
Inventory	<ol style="list-style-type: none"> 1. Settling and allowing this second and final account and confirming the acts of the petitioner as conservator; 2. Authorizing the attorney's fees; and 3. Authorizing Petitioner to turn over the remaining assets of the conservatorship estate to Clayton James Stott, successor trustee of The Patricia Stoll Gregory Stott Survivor's Trust. 		
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(c)			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
			Reviewed by: JF
			Reviewed on: 08/04/15
			Updates:
			Recommendation:
			File 8 - Stott

9 Gene Ray Chance (Estate)

Case No. 13CEPR00612

Atty Standard, Donna M (for Walter Sherwood Chance – Petitioner – Executor)

First Account and Report of Status of Administrator of Estate

DOD: 10/16/2011		<p>WALTER SHERWOOD CHANCE, Executor, is petitioner.</p> <p>Account period: 07/12/2013- 01/31/2015</p> <p>Accounting - \$175,373.59 Beginning POH - \$165,000.00 Ending POH - \$173,960.16 (\$8,960.16 is cash)</p> <p>Executor – Not requested at this time</p> <p>Attorney – Not requested at this time</p> <p>Petitioner states: the estate is not in a condition to be closed at the present time until a sale of real property has occurred. At time of sale petitioner would request that upon confirmation of the sale and receipt of all proceeds from the sale of the real property that those funds be distributed pursuant to the Private Covenant/Contract which has been deemed the Last Will of Decedent, Gene Ray Chance.</p> <p>Wherefore:</p> <ol style="list-style-type: none"> Petitioner requests the First Account and Report of Administrator be allowed and approved as filed; The costs of this proceeding be ordered paid by the estate in portions determined by the Court at the time of closing the estate. For such other and further order the Court may deem just and proper. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Need Amended Petition. The material facts have changed as evidenced in the corrected Inventory and Appraisal filed 08/03/2015. The two Supplements to the First Account and Report of Status of Administration that were filed in essence to clear the examiner notes have made following the information difficult. Need a concise new pleading served on all interested parties. Court order dated 09/20/2013 requires all estate funds are ordered to be placed in a blocked account. On 07/20/2015 the second Supplement to the First Account and Report of Status of Administration of Estate was filed. The declaration asserts that the cash amounts presently in the Estate are now held by Sabine State Bank and Trust in a blocked interest bearing account. The cash had previously been held in a regular account despite the Court's order which required all estates funds to be placed in a blocked account. It appears that the Court has never been provided a Blocking order. Need Order to Deposit Money into Blocked Account, mandatory Judicial Council Form MC-355 and Receipt for Blocked Account, mandatory Judicial Council form MC-356. 	
Cont. from 051915 063015, 070715, 072015				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input checked="" type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
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<input checked="" type="checkbox"/>	Letters	11/26/13		
<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	x		
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input checked="" type="checkbox"/>	FTB Notice			

Please see additional page

Reviewed by: LV

Reviewed on: 08/04/2015

Updates:

Recommendation:

File 9 - Chance

1. Petitioner's signature on the corrected Inventory and Appraisal filed 08/03/2015 appears to be a color copy and not an original signature as required.
2. Order appointing personal representative orders all funds of the estate to be placed in a blocked account. Accounting shows income from rents in the amount of \$9,000 and disbursements of \$1,988.33. Supplement to the First Account and Report of Status of Administration of the Estate filed 06/15/2015 states "the cash amounts presently in the Estate are held by Sabine Bank in a blocked interest bearing account" however there is no evidence of a receipt for blocked account having been filed with the court. Need proof of funds placed in a blocked account.
3. Need Order.

Note: Executor was appointed with limited IAEA authority and funds to be placed into a blocked account. Any sale of real property would require court confirmation.

Minute Order of 07/20/2015: Counsel represents that she has obtained the receipt and is now awaiting return of a corrected Inventory and Appraisal.

Note: If the petition is granted status hearings will be set as follows:

- **Monday, 08/08/2016 at 9:00a.m. in Dept. 303** for the filing of the Second account and final distribution.

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.

Dept. 303, 9:00 a.m. Monday, August 10, 2015

10 Zachery Mahala & Brett Mahala (GUARD/P) 13CEPR00716

Petitioner Hardin, Tammy (Pro Per – Mother)

Petition for Termination of Guardianship

Zachery Age:15	<p>TAMMY HARDIN, mother, is petitioner.</p> <p><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 07/13/2015: Examiner notes provided in open court. The Court orders the Court Investigator to contact the Ash County Sherriff's Department in North Carolina to confirm whether or not charges will be filed against Ms. Hardin. For the record, Ms. Hardin denies all allegations and any recent use of procession.</p>	
Brett Age:13			
Cont. from 071315			
<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			
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<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 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: 08/03/2015	
		Updates:	
		Recommendation:	
		File 10 - Mahala	

Petition for Final Settlement and Final Distribution, Waiver of Account, and for Allowance of Statutory Fees for the Executor and the Attorney

DOD: 1/17/13	DRAKE K. COTTON , Executor, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Inventory and Appraisal does not include the decedent's date of death. Probate Code §8802 states the property listed shall state the fair market value of the items at the time of decedent's death.</p> <p>2. Statutory fees were calculated incorrectly. The correct statutory fee is \$7,700.00.</p> <p>Note: Examiner interlineated the order with the correct statutory fees.</p>
	Accounting is waived.	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.	I & A - \$235,000.00	
<input checked="" type="checkbox"/> Verified	POH - \$235,000.00	
<input checked="" type="checkbox"/> Inventory	Executor - \$8,050.00 (greater than statutory, see note #2)	
<input checked="" type="checkbox"/> PTC		
<input checked="" type="checkbox"/> Not.Cred.	Attorney - \$8,050.00 (greater than statutory, see note #2)	
<input checked="" type="checkbox"/> Notice of Hrg W/O		
<input type="checkbox"/> Aff.Mail	Distribution, pursuant to Decedent's Will, is to:	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.	Drake K. Cotton - real property located at 6555 N. Raisina in Fresno and 1425 E. Calwa in Fresno.	
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters 3/14/14		
<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 checked="" type="checkbox"/> FTB Notice		
		<p>Reviewed by: KT</p> <p>Reviewed on: 8/5/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11 - Cotton</p>

Attorney Cobb, Lee S.W. (for Casey S. Rogers – Trustee – Petitioner)
 Petition to Settlement and Approve First Account and Report of Administration of the
 Eugene M. and Evelyn I Ford Family Trust - Survivor's Trust; The Eugene M and Evelyn I Ford
 Family Trust - Marital Trust; and the Eugene M. and Evelyn I. Forf Family Trust - Credit Trust

Eugene M. Ford DOD: 4/25/93	CASEY S. ROGERS, Trustee, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
Evelyn I. Ford DOD: 12/23/13		
✓ 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		Reviewed by: skc
9202		Reviewed on: 8/4/15
Order	x	Updates:
Aff. Posting		Recommendation:
Status Rpt		File 12 – Ford
UCCJEA		
Citation		
FTB Notice		

First and Final Report and Petition for Its Settlement, for Allowance of Executor's Commissions and Attorneys' Statutory Fees, and for Final Distribution of Estate Under Will of Waiver of Account

DOD: 7/25/14		<p>MICHAEL A. DELANEY, son and Executor with Full IAEA without bond, is Petitioner.</p> <p>Accounting is waived</p> <p>I&A: \$223,984.59 POH: \$225,328.60 (Cash)</p> <p>Executor (Statutory): \$7,480.00</p> <p>Attorney (Statutory): \$7,480.00</p> <p>Costs: \$1,439.00 (filing, publication, certified copies)</p> <p>Distribution pursuant to Decedent's will:</p> <p>Michael A. Delaney and Kevin F. Delaney, Co-Trustees of the William P. and Evalan J. Delaney Revocable Trust dated 1/7/99: \$208,929.60</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input checked="" type="checkbox"/>	PTC			
<input checked="" type="checkbox"/>	Not.Cred.			
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<input type="checkbox"/>	CI Report			
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<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input checked="" type="checkbox"/>	FTB Notice			
				Reviewed by: skc
			Reviewed on: 8/4/15	
			Updates:	
			Recommendation: SUBMITTED	
			File 13 – Delaney	

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

DOD: 7-1-06	JONATHAN VAUGHAN, Son, is Petitioner and requests appointment as Administrator with Limited IAEA without bond.		NEEDS/PROBLEMS/COMMENTS: Note: This matter was continued for corrected publication, which has now been filed. Note: The Court will set status hearings as follows: <ul style="list-style-type: none"> Monday, Sept. 21, 2015 for the filing of bond, if required Monday, Jan. 11, 2016 for the filing of the inventory and appraisal Monday, Oct. 17, 2016 for the filing of the first account or petition for final distribution. If the proper items are on file pursuant to local rules, the status hearings may be taken off calendar.
	Limited IAEA – ok		
	Decedent died intestate		
Cont from 032315, 050415, 060215, 070715, 072015	Residence: Miramonte, CA Publication: Fresno Bee		
Aff.Sub.Wit.	Estimated value of estate: Personal property: Unknown, if any Real property: \$78,000.00		
✓ Verified	Probate Referee: Rick Smith		
Inventory	Petitioner requests bond be waived because the estate consists solely of real property upon which Petitioner currently resides. Waivers have been obtained from only two of the heirs; however, Petitioner requests that if the property is sold, any proceeds be placed into a blocked account.		
PTC			
Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail	w		
✓ Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: skc			
Reviewed on: 8/3/15			
Updates:			
Recommendation:			
File 14 - Vaughan			

DOD: 6/16/06		<p>IRMA E. CEJA is Petitioner and requests appointment as Executor with Full IAEA. (Relationship not stated, bond not addressed.)</p> <p>Full IAEA – need publication</p> <p>Petitioner states Decedent died intestate at #3e.</p> <p>Residence: Fresno Publication: need publication</p> <p>Estimated value of estate: Annual income from real property: \$110,000.00</p> <p>Probate Referee: Steven Diebert</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> Page B is a competing petition filed by Rudy Ceja (Son).</p> <p><u>Note:</u> Per Substitution of Attorney filed 6/24/15, Petitioner is now represented by Attorney Mark Castro; however, nothing further has been filed. The following issues remain:</p> <p><u>Note:</u> Petitioner may wish to amend the petition in its entirety, or may wish to seek legal advice regarding other potential options for this estate.</p> <ol style="list-style-type: none"> Petitioner does not state her relationship to the decedent and does not list herself at #8. Petitioner states at #3f(2) that she is entitled to Letters, but does not explain. The petition is blank at #5. Petitioner does not provide the relationships of the people listed at #8 to the decedent. Petitioner requests appointment as executor, but states the decedent died intestate, and the petition is blank at #3f. Need clarification. #3c indicates that the estate consists of income from real property, but does not indicate real property. Did petitioner mean that the estate consists of real property valued at \$110,000 rather than income? If the will does not waive bond, bond of at least \$110,000 will be required unless bond is waived by all heirs. Need Notice of Petition to Administer Estate (Form DE-121). Need proof of service of Notice of Petition to Administer Estate on all persons entitled to notice pursuant to Probate Code §8110. Need publication pursuant to Probate Code §8120. <p><u>Note:</u> If granted, the Court will set hearing dates for the filing of the Inventory and Appraisal and the filing of the petition for final distribution as appropriate. Hearing dates are not provided at this time, as it does not appear the petition is ready to be granted.</p>	
Cont from 040815, 051315, 062415				
<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.			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			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
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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: 8/3/15		
		Updates:		
		Recommendation:		
		File 15A – Ceja		

16 Brayden Kane Hallman (GUARD/P)

Case No. 15CEPR00314

Petitioner Hallman, Donna Louise (Pro Per – Paternal Grandmother)

Petitioner Hallman, Frank Marlon (Pro Per – Paternal Grandfather)

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

Age: 6	<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS:
	<p>DONNA LOUISE HALLMAN, and FRANK MARLON HALLMAN, paternal grandparents, are petitioners.</p> <p style="text-align:center;"><u>Please see petition for details</u></p>	<p>1. Page #5 of the Guardianship Petition – Child Information Attachment (GC 210(CA)) which pertains to whether the child has Native American Ancestry was not completed. Need declaration with page #5 attached.</p>
Cont. from 070115		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
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<input checked="" type="checkbox"/> Pers.Serv. w/		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
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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: 08/03/2015
		Updates:
		Recommendation:
		File 16 - Hallman

Spousal Property Petition

DOD: 09/23/2014	<p>CHRISTINA F. RENDINO, surviving spouse, is petitioner.</p> <p>Decedent died intestate</p> <p>Petition states: the decedent died intestate. At the time of the decedent's death, the only heir-at-law surviving him, other than petitioner, was the decedent's mother, Mercedes D. Rendino. Mercedes D. Rendino died on 05/16/2015, however, prior to her death, Mercedes D. Rendino assigned her interest in the decedent's estate to the petitioner. The assignment of interest was filed in the proceeding on 06/16/2015, as an exhibit to the Declaration of Joseph J. Doerr.</p> <p>If the within petition is granted, petitioner, hereby requests that the hearing scheduled for 08/26/2015 for the appointment of petitioner as administrator of the decedent's estate be taken off calendar and the pending petition for letters of administration be dismissed for lack of property in the decedent's estate requiring administration.</p> <p>Petitioner requests Court confirmation that 100% of the real property located at 5090 N. Roosevelt Ave. Fresno, Ca. and 36532 Franklin Ave. Madera, Ca. pass to the petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Petition for Letters of Administration was continued to 08/26/2015 from a previous hearing.</p> <ol style="list-style-type: none"> This case was initiated by the filing of the Petition for Letters of Administration listing the surviving spouse, Christina F. Rendino, and Mercedes D. Rendino, mother, as intestate heirs. The Petition for Probate has not yet been granted and letters have not issued. Petitioner has now filed this Spousal Property Petition. Mercedes D. Rendino, Mother, assigned her interest of the decedent's estate to the petitioner prior to her passing on 05/16/2015. There does not appear to be a provision in the Probate Code that would allow an individual to assign or disclaim their right in a summary proceeding. Petition does not set forth enough facts for the Court to determine that it is indeed community property. Need Attachment 7 setting forth the following: <ol style="list-style-type: none"> The date the petitioner and decedent were married. The date the property was acquired. That all the property the petitioner is asking to pass was acquired during the marriage using community property funds and was not received by gift, devise or bequest.
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		
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<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
<p>Reviewed by: LV</p>		
<p>Reviewed on: 08/05/2015</p>		
<p>Updates:</p>		
<p>Recommendation:</p>		
<p>File 17 – Rendino</p>		

Age: 5	<u>TEMPORARY EXPIRES 08/10/2015</u>		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 06/22/2015: The Court orders that there be no visits for Tricia Marie Roy, mother, until she presents herself to the Court. The Court further orders supervised visits only for Joshua Clemons, father, upon mutual agreement with Renae Clemons. There is to be no overnight visits.</p>
	<p>RENAE N. CLEMONS, Paternal Aunt, is Petitioner.</p> <p style="text-align: center;"><u>Please see petition for details</u></p>		
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			
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<input checked="" type="checkbox"/> Pers.Serv.	w/		
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<input type="checkbox"/> FTB Notice			
			Reviewed by: LV
			Reviewed on: 08/04/2015
			Updates:
			Recommendation:
			File 19 – Clemons

20 Isaiah Cervantes, Ilene Cervantes (GUARD/P) Case No. 15CEPR00587

Petitioner Lucero, Dora A. (Pro Per – Maternal Grandmother – Petitioner)

Petitioner Aguilar, Maria D. (Pro Per – Maternal Great-Aunt – Petitioner)

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

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need completed Order. Local Rule 7.1.1.F.</p>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			W
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	Clearances	X		
	Order	X		
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 8/4/15	
			Updates:	
			Recommendation:	
			File 20 – Cervantes	

Attorney Teixeira, J. Stanley (for Petitioner Diana L. (Sanchez) Evans, Successor Trustee)

Petition for Order Confirming Trust Assets

Gibson DOD: 11/18/1998	<p>DIANA L. (SANCHEZ) EVANS, daughter and Successor Trustee, is Petitioner.</p> <p>Petitioner states:</p> <ul style="list-style-type: none"> • Petitioner is the presently acting [Successor] Trustee of the GIBSON AND MARIE HUNTER REVOCABLE FAMILY TRUST, names as first successor trustee upon the death of the original trustees (copy attached as Exhibit 1); • Schedule A of the Trust evidences the intent of the Settlers to transfer "Property in Tollhouse, CA" to the Trust without any further elaboration or identification; • Petitioner has identified unimproved real property located in Tollhouse, CA, as being held by "GIBSON HUNTER, as his sole and separate property" according to a deed recorded on 1/3/1985, in the office of the Fresno County Recorder (copy attached as Exhibit 2); • The correct APN number has been determined from research and comparison of the recorded Deed with the search result profile for Decedent GIBSON HUNTER, showing his ownership of the property (Declaration regarding discrepancy attached as Exhibit 3); • Petitioner requests the Court confirm the Tollhouse real property is an asset subject to the Trust and under the control of Petitioner as Successor Trustee, based upon the Schedule A attached to the Trust as part of the Trust declaration; • Petitioner requests that notice of this Petition be dispensed with as to ELMA MAE MALDONAR and ROBERT MALDONAR, relationships unknown, based on matters stated in Declaration of J. Stanley Teixeira Re Due Diligence attached as Exhibit 4. <p>Petitioner prays for an Order that:</p> <ol style="list-style-type: none"> 1. The real property in Tollhouse, CA, described in the Petition is an asset subject to the management and control of Petitioner as Trustee of the Trust under Schedule A of the Declaration of Trust; and 2. Notice to ELMA MAE MALDONAR and ROBERT MALDONAR is dispensed with. 	NEEDS/PROBLEMS/COMMENTS:
Marie DOD: 8/9/1999		
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail <small>w/o</small>		
<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		
	<p>Reviewed by: LEG</p> <p>Reviewed on: 8/4/15</p> <p>Updates:</p> <p>Recommendation: File 21 – Hunter</p>	

24 Abigail Bautista, Khloe Bautista (GUARD/P) Case No. 15CEPR00662

Attorney Gallegos, Alfred A. (for Cristino & Julia Romero – maternal grandparents/Petitioners)

Attorney Ambriz, Hallie S. (for Edgar Bautista – father/Objector)

Petition for Appointment of Temporary Guardian of the Person

Abigail, 5	<p align="center"><u>GENERAL HEARING: 09/08/15</u></p> <p>CRISTINO ROMERO and JULIA ROMERO, maternal grandparents, are Petitioners.</p> <p>Father: EDGAR BAUTISTA</p> <p>Mother: MELISSA ROMERO – <i>Consent & Waiver of Notice filed 07/08/15</i></p> <p>Paternal grandfather: ANTONIO BAUTISTA – <i>deceased</i></p> <p>Paternal grandmother: GUADALUPE BAUTISTA</p> <p>Petitioners state [see petition for details].</p> <p>Father's Opposition to Maternal Grandparents' Petition for Temporary Guardianship filed 07/17/15 states: [see file for details].</p> <p>Father's Declaration attached to Objection states: [see file for details].</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 07/20/15 Minute Order from 07/20/15 states:</u> The Court orders that Edgar Bautista shall not use corporal punishment of any kind, at any time, for any reason, on either child. Cristino and Julia Romero shall have visitation every weekend from Friday at 5pm through Sunday at 5pm, starting 07/24/15. There shall be no unsupervised visits with Melissa Romero, and she shall not be left alone with the minors at any time for any reason. The Romero's will pick up the minors on Friday's at 5pm and Mr. Bautista will pick them up at 5pm on Sundays. Mr. Bautista is to send all medicine and supplies for the lice treatment with the minors for the visits.</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i> for the temporary guardianship hearing. 2. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person</i> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for: <ol style="list-style-type: none"> a. Edgar Bautista (father)
Khloe, 3		
Cont. from 072015		
<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		
<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 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		
	<p>Reviewed by: JF</p> <p>Reviewed on: 08/03/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 24 – Bautista</p>	

Probate Status Hearing Re: Filing Account

DOD: 11/06/06		<p>NAGLAA K. ALAMEELDIN, sister, was appointed Administrator with full IAEA and bond of \$190,000.00 on 01/02/07.</p> <p>NAGLAA K. ALAMEELDIN filed a Status Report of Administration of Estate and Petition to Approve First Account on 09/21/10.</p> <p>The Petition to Approve First Account was continued several times and the Court denied the Petition with leave to Amend on 06/04/12.</p> <p>Minute Order from hearing on 8/6/12 set this matter for status regarding filing the account.</p> <p>In June of 2013 the attorney reported that the estate is waiting on funds totaling \$69,425.63 from CA State Controller unclaimed property. In addition since there was a minor beneficiary a guardianship of the estate would be needed prior to distribution.</p> <p>Former Status Report filed 8/11/14 states the estate received a check in the amount of \$69,352.97 from the State Controller's office. Administrator states they are in the process of preparing a formal accounting and petition for final distribution in the next 45 days.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Final Account and Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Cont. from 100412, 113012, 020113, 040513, 060713, 080913, 090613, 110113, 010914, 041014, 081114, 100914, 120114, 011215, 030215, 040615, 042715, 051115, 060115, 062915, 072715			
Aff.Sub.Wit.			
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Letters			
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Objections			
Video Receipt			
CI Report			
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Aff. Posting			
Status Rpt	X		
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: skc	
		Reviewed on: 8/3/15	
		Updates:	
		Recommendation:	
		File 25 - Alameeldin	

Petitioner
Petitioner

Gonzalez, Juan Arellano (pro per – maternal grandfather/Petitioner)
Gonzalez, Maria G. (pro per – maternal grandmother/Petitioner)

Petition for Appointment of Temporary Guardian of the Person

Age: 5		<u>GENERAL HEARING: 09/28/15</u>		NEEDS/PROBLEMS/COMMENTS:	
		<p>JUAN ARELLANO GONZALEZ and MARIA G. GONZALEZ, maternal grandparents, are Petitioners.</p>		<p>Petitioners are Spanish speaking.</p>	
Cont. from		Father: JOEL LEON JACOBO		<p>1. Need <i>Notice of Hearing</i>.</p>	
	Aff.Sub.Wit.	Mother: ARIANA GONZALEZ – deceased		<p>2. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:</p>	
✓	Verified	Paternal grandfather: JUAN LEON		<p>a. Joel Leon Jacobo (father)</p>	
	Inventory	Paternal grandmother: BERTHA JACOBO			
	PTC	Petitioners state [see Petition for details].			
	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: 08/04/15	
				Updates:	
				Recommendation:	
				File 26 – Leon	

Attorney
Attorney

Hemb, Susan A. (for Petitioners Rita and Walter Segal)
McCracken, Terri L. (for Nicole Hinojosa – Mother – Objector)

Petition for Appointment of Temporary Guardian of the Person (Prob. Code §2250)

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 8/3/15:</u> Ms. McCracken is to file her response by 8/8/15. Ms. Hemb states that she will accept a faxed copy of said Response. The Court orders the Court Investigator to determine the status of any CPS actions in this matter.</p> <p><u>Update:</u> Mother's Opposition was filed 8/5/15.</p> <ol style="list-style-type: none"> 1. Court records indicate a presently pending Family Court matter. Petitioners may wish to seek joinder in the family law proceeding and request relief from that court pursuant to Local Rule 7.15.7. 2. On 8/4/15, Attorney Hemb filed Declaration Regarding Diligence that states Nicole Hinojosa (Mother) could not be served. However, this conflicts with the Notice of Hearing filed 7/30/15 which indicates she was personally served on 7/27/15. Need clarification: Was Ms. Hinojosa personally served pursuant to Probate Code §2250(e)? 	
Cont. from 072715, 080315				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
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<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
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<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: 8/4/15		
		Updates: 8/6/15		
		Recommendation:		
		File 27 – Hinojosa		

Attorney Hopper, Cindy J. (for Petitioners Heather Rule and Kevin Rule)

Petition for Appointment of Temporary Guardian

		<u>General Hearing set for 10/6/2015</u>	NEEDS/PROBLEMS/COMMENTS:
		HEATHER RULE and KEVIN RULE , paternal aunt and uncle, are Petitioners.	
		<i>~Please see Petition for details~</i>	<p>1. Pursuant to <i>Ex Parte Finding Re Temporary Guardianship</i> filed 8/5/2015, need proof of 4 days' notice by personal service or by verifiable electronic service of a <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian</i>, or <i>Consent to Appointment of Guardian and Waiver of Notice</i>, or a <i>Declaration of Due Diligence</i> for:</p> <ul style="list-style-type: none"> • Seyhan Inci, mother; • Stephen Francois, father; • Raven K. Inci-Francois, proposed ward (age 15).
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	
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<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	X	
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<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
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<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 8/6/15
			Updates:
			Recommendation:
			File 28 – Francois