

Age: 33	MARIA MAIRENA , Mother and Conservator, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 7/19/12. Minute order states the Court directs that the Bonding Company be placed on notice. – Notice to the bonding company mailed on 8/21/12.</p> <p>1. Petitioner states the conservatorship estate now qualifies as a small estate as defined in Probate Code §2628(a); however, Examiner notes that at the close of this account period (9-17-11), the real property had not yet foreclosed.</p> <p><u>The Court may require further accounting</u> reflecting the current status of the conservatorship estate as meeting the requirements of §2628 before dispensing with accountings.</p> <p><u>If accountings are not dispensed per Probate Code §2628(a), the Court will set a status hearing for the next account Friday, 1-10-14 (a 2-year account period).</u></p> <p><u>If further accounting is required before dispensing accountings, the Court will set a sooner status hearing for such further account.</u></p> <p style="text-align: center;">SEE PAGE 2</p> <p>Reviewed by: skc /KT</p> <p>Reviewed on: 8/21/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1 - Mairena</p>
	Current Bond is \$56,000.00 (<i>Sufficient</i>)	
	Account period: 9-18-09 through 9-17-11	
	Accounting: \$358,645.64	
	Beginning POH: \$275,172.97	
	Ending POH: \$245,823.15 (\$323.15 cash plus real property and personal property)	
Cont. from 053112, 071912		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Conservator: Waived	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC	Attorney Downing: Not requested	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Attorney Blau (<i>Petitioner's former attorney</i>): \$1,980.00 (9 hours @ \$220.00/hr. Itemized services include reparation for the 2 nd Account, correspondence regarding bond and real property sale.) – Authorized per Minute Order 5-31-12	
<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	Petitioner states a Special Needs Trust was established in 2009 with the proceeds of a settlement and is under the supervision of San Francisco Superior Court with a professional fiduciary as trustee. In addition, litigation settlement proceeds from a Fresno Superior Court case that were previously listed as a "receivable" for \$20,000.00 were distributed directly to the special needs trust and are not under the control of the Conservator.	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report	Conservatee's home was foreclosed on 12-7-11 (with Court approval at the settlement of the last account), and her current home is an asset of the special needs trust. Also at the last account, the Conservator was awarded the Conservatee's 1998 Honda Civic as payment for her services; however, Petitioner states she did not want compensation, and the vehicle was sold and the proceeds were deposited to the conservatorship estate account.	
<input checked="" type="checkbox"/> Order	<p>Petitioner states the conservatorship estate now qualifies as a small estate as defined in Probate Code §2628(a).</p> <p>Petitioner requests that:</p> <ol style="list-style-type: none"> 1. Notice of hearing of this account, report and petition have been given as required by state law; 2. Petitioner be directed to pay the sum of \$1,980.00 to the Law Office of Laurence Blau – <i>Authorized per Minute Order 5-31-12</i>; 3. The Court order that Conservator is no longer required to provide accountings to the Court; and 4. All acts and transactions of Conservator be ratified, confirmed and approved. <p style="text-align: center;">SEE PAGE 2</p>	
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		

2. Examiner notes that although the Conservatee lives with her husband, the conservatorship estate appears to be paying for all of the household expenses (power, utilities, cable, food, gardening, household supplies and repairs, home security, etc. Need clarification: Does the Conservatee's husband contribute to household expenses? - **Declaration of Conservator filed 8/3/12 states the conservatee's husband has been chronically unemployed for the past three years. He is currently actively seeking employment. When he does pick up short term jobs and he contributes to the household when he is able.**
3. During this account period, Examiner notes approx. \$2,500.00 in fast food and other restaurant charges that appear to pay for meals for more than just the Conservatee. For example:
- Subway \$14.50
 - In n Out Burgers \$33.40
 - Fosters Freeze \$18.89
 - Taco Bell: \$14.13
 - Charleys Grill: \$34.04
 - Wing Stop: \$46.64
 - ROP Grill Brazilian: \$121.61
 - Cheesecake Factory: \$198.31
 - Subway \$119.70
 - HTB (Hometown Buffet?): \$37.72
- (These are just a few of the numerous restaurant meal charges listed.)*

The Court may require clarification regarding the meals purchased for Conservatee and others with the Conservatee's funds and may require repayment and surcharge. **Declaration of Conservator states since the summer of 2009 when the conservatee was released from the nursing home she has made vast improvements regarding her mobility and ability to communicate. Because of these strides she is now able to attend movies, go to the park, to enjoy eating out and other activities that afford her to get out of the house. The conservator assures the court that the family is not going to eat out as often anymore due to the court's concerns**

4. Petitioner previously requested the Honda Civic that was no longer usable by the Conservatee as compensation and that request was granted at the last hearing; however, this petition states she declined the vehicle, but sold it for \$500.00, which was a \$4,500.00 loss. The Court may require clarification as to how the sale value was reached, since this appears to be a substantial loss to the conservatorship estate. - **Declaration states the Conservator was previously awarded the Honda in the second account for compensation for her services. It was not the conservator's wish to be paid for her services and so she sold the vehicle and deposited the proceeds into the conservatee's account.**
5. Disbursements Schedule reflects \$200.00 as a birthday gift for the Conservatee's brother is a violation of Cal. Rules of Court 7.1059 (Standards of conduct for the conservator of the estate). The Court may require reimbursement to the estate and surcharge. - **Declaration of Conservator states it was the request of the conservatee to give her brother the sum of \$200 as a birthday gift**
6. There are numerous gas and vehicle related expenses; however, Petitioner states the van is an asset of the Conservatee's special needs trust. Need clarification. - **Declaration of Conservator states a Special Needs Trust was set up for the Conservatee primarily to receive Medi-Cal assistance to pay for her ongoing medical needs. In order to remain eligible for Medi-Cal benefits, the van was purchased by the SNT; the maintenance of the vehicle, the insurance, gas, oil and miscellaneous transportation expenses are paid from the conservatorship estate.**
7. There are numerous additional questionable disbursements during this account period. For instance, in September 2009, approx. \$1,800 was spent at Costco, Kmart, Walgreens for "food, clothing, household items and sanitary supplies," and on 10-2-09, over \$1,000 was spent for "furniture and baskets" at Target. However, there are no personal property items listed as assets. The Court may require clarification regarding the various expenditures. Were these funds spent for the benefit of the Conservatee pursuant to standards of conduct for a conservator of the estate? See Cal. Rules of Court 7.1059. **Declaration of Conservator states in September 2009 the after three and a half years living in a nursing home, the conservatee was afforded the opportunity to return to independent living in her own home. A new home was purchased by the SNT however the surge of purchases in September and October of 2009 were made to obtain some furniture, appliances and supplies for the new home.**

Please see additional page

Note: There may be additional issues; however, Examiner cannot continue in detail without further information. For example, The history of this case is not readily available from this petition and Examiner is unable to determine the reason for numerous trips to Northern California (Hayward and Milpitas), and whether gas for such trips is appropriate without further information. – **Declaration of Conservator states the excursions to Milpitas and Hayward were trips to visit family residing in the area. The conservatee is overjoyed at being able to travel.**

Declaration of Conservator filed on 8/3/12 states as conservator for her daughter's estate, she has not made frivolous purchases but she has attempted to make her happy as she is able and to provide her with all the necessities of life. Conservator states that in order for her daughter to remain eligible for Medi-Cal the conservatee's bank account cannot exceed \$3000 on the first of any given month. On the rare occasion that "gifts" were made, these were made at the request of the conservatee. Conservator state that her attorney has informed her that such gifts are not unusual in conservatorships so long as they are not excessive.

Report of Administrator of Insolvent Estate and Request for Final Discharge (Prob. C. 11600)

DOD: 9/17/2010	PUBLIC ADMINISTRATOR , Successor Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	I & A - \$98,000.00	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Petitioner states they were appointed successor Administrator by Minute Order dated 6/6/2012.	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Petitioner has researched the estate and concluded that there were no assets belonging to the estate. The original petition for probate indicated there was a parcel of real property. Petitioner's research concluded that the property was foreclosed upon. Therefore, petitioner wishes to close the estate, because it is insolvent.	
<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	Petitioner prays for an Order:	
<input type="checkbox"/> Objections	1. The final report prepared herewith be settled, allowed and approved;	
<input type="checkbox"/> Video Receipt	2. Due to the lack of an estate, the Fresno County Public Administrator , be discharged as successor administrator of the estate.	
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 8/21/12
		Updates:
		Recommendation:
		File 2 - Barrera

Age: 91 years		<p>PUBLIC GUARDIAN, Conservator, is petitioner.</p> <p>Petitioner states the first account is no due until the end of 2012. However, Petitioner needs to apply for Medi-Cal for the conservatee. Therefore, she is petitioning for fees before having to spend the conservatee's assets down for eligibility purposes.</p> <p>Petitioner requests compensation as follows:</p> <p>Conservator - \$2,732.84 (22.49 Deputy hours @ \$96/hr and 7.55 Staff hours @ \$76/hr)</p> <p>Attorney - \$1,250.00 (per Local Rule)</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
DOB: 9/5/1920			
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 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: KT</p> <p>Reviewed on: 8/21/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 3 - Karaian</p>	

4 Lucy M. Bosniak (CONS/PE)
Atty Knudson, David N. (for Andrew M. Bosniak – Son)
Atty Teixeira, J. Stanley (for Audrey Medina – Daughter)
Atty McCracken, Terri L. (for Angelina Bosniak – Granddaughter)
Atty LeVan, Nancy (Court-appointed for Lucy M. Bosniak – Conservatee)
Atty Kruthers, Heather H. (for Fresno County Public Guardian –Conservator)

Review Hearing Re: Communication Procedures and Protocol for Family Notification

Age: 86 years	<p>PUBLIC GUARDIAN was appointed as Conservator of the Person and Estate after a court trial on 8/3/12.</p> <p>Minute order from the trial set this review hearing regarding communication procedures and protocol for family notification including when the Public Guardian cannot be contacted.</p> <p>Declaration of J. Stanley Teixeira filed on 8/9/12 states he has been in communication with his client, Audrey Medina and with attorney Terri McCracken who represents Angela Bosniak. Mr. Teixeira states they have settled on the following:</p> <ul style="list-style-type: none"> On Monday of any week when Audrey Medina knows that she will be unable to visit Lucy Bosniak on the days designated for her visitation that week, Audrey Medina shall notify both Deputy Public Guardian Stacy Mauro and Mr. Teixeira. Upon receipt of such notification, Mr. Teixeira or someone from his office with notify Angelina Bosniak by e-mail that Audrey Medina will be unable to visit Lucy Bosniak on a designated day. <p>Mr. Teixeira states Ms. McCracken has consented and authorized such direct communication between Mr. Teixeira's office and her client, for the limited purpose of providing information about Audrey Medina's intended visitation with Lucy Bosniak.</p>	NEEDS/PROBLEMS/COMMENTS:
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: KT
		Reviewed on: 8/21/12
		Updates:
		Recommendation:
		File 4 - Bosniak

5A James L. Rutherford (Estate)

Case No. 12CEPR00016

**Atty Keeler, William J., of Garvey Schubert Barer in Portland, OR, and
Burnside, Leigh W., of Dowling Aaron Incorporated in Fresno, CA
(together, for Michelle L. Eacret, Administrator)**

**Atty LeVan, Nancy for Robert Jones and Denise Jones Co Administrators of the Estate of Sharon Rutherford
(1) Petition for Issuance of Citation Requiring Robert Jones and Denise Jones to
Appear and (2) Account for Estate**

James Rutherford DOD: 10-12-11	MICHELLE L. EACRET , Niece and Administrator with Full IAEA with bond of \$200,000.00, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Sharon Rutherford DOD: 10-11-11	Petitioner requests an order directing that a citation be issued to ROBERT JONES, as an individual and as Personal Representative of the Estate of Sharon Rutherford, and DENISE JONES, as an individual and as Personal Representative of the Estate of Sharon Rutherford, under Probate Code §§ 8770(a) and 8873(a).	Continued from 8/15/12. Minute order states parties are directed to conduct a walk-through of the property. Ms. LeVan is directed to prepare the necessary document(s) indicating what her clients have.
Cont. from 081512	Petitioner states ROBERT JONES and DENISE JONES have removed documents, assets and other materials belonging to the decedent's estate from the residence both before and after their appointment as joint personal representatives of the Estate of Sharon Rutherford. Petitioner states they have knowledge of or documents relating to accounts held by this decedent, the insurance policy on the residence, income and property taxes of this decedent, and other matters which Petitioner must obtain to be able to marshal and inventory the assets of this decedent's estate.	<p>Note: Order for Probate filed 3-16-12 specifies that both the Administrator and Objectors Robert Jones and Denise Jones shall not destroy any documents or papers of the decedent or his spouse, Sharon Rutherford (12CEPR00101) and that the parties shall preserve and maintain any such documents or paperwork which they currently have in their possession, or which may come into their possession, and that the parties shall make available for inspection all such documents until further order of the Court.</p>
<input type="checkbox"/> Aff.Sub.Wit.	Despite requests and repeated attempts to meet to address these issues without Court intervention, Petitioner has been unable to obtain the materials or information from Robert Jones and Denise Jones.	<p>Note: ROBERT JONES and DENISE JONES were appointed Co-Administrators on 3-16-12 of the Estate of Sharon Rutherford (this Decedent's spouse) in 12CEPR00101.</p>
<input checked="" type="checkbox"/> Verified	Petitioner requests the Court issue a citation compelling them to appear before the Court and make an account under oath concerning any taking of documents or materials relating to the decedent's estate, and for such other orders as the Court considers proper.	Reviewed by: skc / KT
<input type="checkbox"/> Inventory	Points and Authorities: Probate Code §8873(a).	Reviewed on: 8/21/12
<input type="checkbox"/> PTC	Declaration of William J. Keeler, Jr., states he was present in Court at a hearing in the present estate when Nancy LeVan, attorney for ROBERT JONES and DENISE JONES, admitted that her clients had taken numerous boxes from the residence.	Updates:
<input type="checkbox"/> Not.Cred.		Recommendation:
<input checked="" type="checkbox"/> Notice of Hrg		File 5A - Rutherford
<input checked="" type="checkbox"/> Aff.Mail w		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		

Declaration of Robert Jones and Denise Jones filed on 8/20/12 states the following is an accurate accounting of documents and items removed from the Rutherford residence still in the Declarants' possession, items given to relatives and documents destroyed before the appointment of Michelle Eacret as personal representative of James Rutherford's Estate.

- Pat and James Rutherford were given three rifles that were wrapped in a white sheet.
- Robert Jones packed up and took between 10-15 boxes of paperwork to be sorted. The bulk of this paperwork was old PG&E, phone, property tax and insurance statements. There were many junk mail flyers, old greeting cards, Kaiser pamphlets, records and bills, old letters, photographs, old tax documents, coupons, house remodel paperwork, vet paperwork, newspaper articles. Approximately 80% of the paperwork was Kaiser information, bills and pamphlets, 10% junk mail, 5% newspaper articles, and 5% were current bills, statements and the unsigned estate planning documents. Copies of the unsigned estate planning documents that were found were attached to Ronald Jones' declaration filed on 2/24/12.
- Pat and Margaret Rutherford recognized Sharon's grandmother's china and told Robert he should remove this from the home in case of a break in. Robert removed the china to take to Sacramento. Robert also took Sharon's mother's Cuckoo Clock from the home to prevent damage.
- No property was removed after their appointment.
- All of the Scottish clothing of James Rutherford located by Objectors were placed on display during the funeral of James Rutherford and was given to Deborah Rutherford. Objectors did not locate or remove any other Scottish clothing or items.
- Carol and Ronald Jones and James and Sharon Rutherford purchased a bird bath capable of holding four (4) sets of ashes. Each of them wanted to be cremated and placed in that bird bath. Currently, Carol Jones, James and Sharon Rutherford's ashes have been placed together in this bird bath.

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

DOD: 10/12/11		MICHELLE EACRET is Administrator/petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Buyer, Susan Mills, was sent notice in care of Realty Concepts, Ltd. California Rules of Court 7.51 requires direct notice.</p> <p>Note: There is currently a dispute with the Estate of Sharon Rutherford, case no. 12CEPR00101, as to the ownership of this real property. The property ownership issue has been set for settlement conference on 10/16/12 at 1:30 p.m. in Dept. 303 and for trial on 11/30/12.</p>
Cont. from		Sale price - \$110,000.00	
		Overbid - 116,000.00	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Appraisal - \$110,000.00	
<input checked="" type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	Property - 4711 N. 7TH Street, Fresno, CA	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Publication - Business Journal	
<input checked="" type="checkbox"/>	Aff.Mail		
<input checked="" type="checkbox"/>	Aff.Pub.	Buyer - Susan Mills, a single woman as her sole and separate property.	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen	Broker - \$6,600.00 (6% - payable to 1/2 to Realty Concepts and 1/2 to Realty Concepts Ltd.)	
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt	Current bond is \$200,000.00 and is sufficient.	
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 8/21/12
			Updates:
			Recommendation:
			File 5B - Rutherford

Petition for Appointment of Success of Trust

DOD: 06/24/11	JAY CORSBY , Settlor Bobbie Corsby's grandson, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	BOBBIE CORSBY as Trustor and Trustee created the trust known as the CORSBY INTERVIVOS TRUST OF 2011 ("Trust") by Intervivos Trust Agreement dated 03/01/11.	
<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 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		

Petitioner States:

1. Bobbie Corsby ("Bobbie"), the original trustee of the Trust died 06/24/11 in Reno, Nevada. Prior to her death, she had been a resident of Fresno County and the principal place of administration of the Trust had been and is Fresno County.
2. Bobbie Corsby's husband predeceased her on 09/03/08. She had two sons, Clyde Corsby, Jr. ("Clyde") and Billy Jack Corsby ("Billy"). Billy predeceased her leaving three children, Bobbie's grandchildren, Jay Corsby (Petitioner), Mark Corsby, and Kelly Barr. Clyde survived Bobbie, but died intestate on 09/12/11 a resident of Nevada. His estate is currently being administered in Washoe County Nevada (Case No. PR 1100469) in which Randall Meadors and John Vicars are the duly appointed Co-Administrators. Clyde was not married and left no surviving issue. Petitioner states that he and his brother and sister are Clyde's heirs under the laws of succession.
3. Administration and distribution of the Trust is not yet complete and a vacancy now exists in the office of the Trustee of the Trust. The Trust designates Clyde to act as successor Trustee, however, Clyde is now deceased and the Trust does not designate any other successor trustee and provides no procedure for appointment of a successor trustee. Therefore, a Court order under Probate Code § 15660(d) is necessary to appoint a successor trustee.
4. Probate Code § 15660(d) provides that any interested person may file a petition for appointment as successor trustee. Petitioner, as a beneficiary of the estate of Clyde, the now deceased beneficiary of the Trust, is an interested person and is willing to act as successor trustee.

Continued on Page 2

Reviewed by: JF
Reviewed on: 08/21/12
Updates:
Recommendation:
File 6 - Corsby

5. Petitioner states that all other persons interested in the Trust, including Mark Corsby and Kelly Barr, the remaining beneficiaries of the estate of Clyde Corsby, Jr. and the Nevada Co-Administrators of the estate of Clyde Corsby, Jr. approve of and consent to Petitioner's appointment to serve as successor Trustee without bond.
6. At the date of Bobbie's death on June 24, 2011, the Trust held title to and the Trust estate included Bobbie's residence located at 2935 N. Vagedes, Fresno, CA. The real property was appraised by Steven Diebert, probate referee, for \$80,000.00 as of the date of Bobbie's death and also as of the date of Clyde's death. The Trust appears to provide that upon Bobbie's death, the entire corpus of the Trust is to be distributed to Clyde. Clyde survived Bobbie, but to the best of Petitioner's knowledge, never acted as successor trustee or distributed the real property of the Trust. Petitioner states that the title to the real property on N. Vagedes is still held in the name of Bobbie Corsby as Trustee of the Corsby Intervivos Trust of 2011. Given that Clyde survived the Bobbie, but is now deceased, his estate is now entitled to the real property. Petitioner states that Clyde's estate is now distributable to his heirs, Jay Corsby (Petitioner), Mark Corsby, and Kelly Barr in equal shares. Other than the real property, Petitioner knows of no other assets of the Trust.
7. Petitioner requests that the Court authorize the successor trustee to sell the real property and distribute the proceeds directly to Jay Corsby (Petitioner), Mark Corsby and Kelly Barr in equal shares as the heirs of Clyde Corsby, Jr. unless the successor Trustee determines a sale cannot presently be made at a reasonable price, or it is otherwise not in the best interests of the persons entitled to distribution, in which event requests the Court authorize and instruct the successor trustee to distribute the real property in equal undivided interests.
8. Petitioner states that the Co-Administrators of Clyde Corsby, Jr.'s estate approve of and consent to such a sale or direct distribution.

Petitioner prays for an Order:

1. Appointing Jay Corsby as successor Trustee of the Trust to serve without bond; and
2. Authorizing the successor Trustee to sell the real property of the Trust and distribute the proceeds directly to the persons named in this petition, unless the Trustee determines the property cannot now be sold at a reasonable price, or that a sale is otherwise not in the best interest of the beneficiaries, and in that event authorizing the Trustee to distribute the property in kind to the persons named in the Petition.

Nomination of Successor Trustee and Consent to Appointment of Trustee and Distribution filed 07/23/12 by Randall Meadors, Co-Administrator of the estate of Clyde R. Corsby, Jr.

Nomination of Successor Trustee and Consent to Appointment of Trustee and Distribution filed 07/19/12 by John Vicars, Co-Administrator of the estate of Clyde R. Corsby, Jr.

Nomination of Successor Trustee and Consent to Appointment of Trustee and Distribution filed 07/19/12 by Jay Corsby.

Nomination of Successor Trustee and Consent to Appointment of Trustee and Distribution filed 07/19/12 by Mark Corsby.

Nomination of Successor Trustee and Consent to Appointment of Trustee and Distribution filed 07/19/12 by Kelly Barr.

DOD: 3/18/2012		<p>JILL M. DUNCAN, JOYCELYN KAY KERNER and PAUL R. DUNCAN, children of the Decedent, are petitioners.</p> <p>40 days since DOD.</p> <p>No other proceedings.</p> <p>Will dated: 3/3/2009</p> <p>I & A - \$109,601.63</p> <p>Petitioners request court determination that decedent's 100% interest in real property, household furniture, furnishings and personal effects, 2005 Chevrolet Impala, 2003 BMX and NY Life Insurance Policies pass to them in equal shares pursuant to the Decedent's Will.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
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<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
				<p>Reviewed by: KT</p> <p>Reviewed on: 8/21/12</p> <p>Updates:</p> <p>Recommendation: SUBMITTED</p> <p>File 7 - Duncan</p>

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

DOD: 5/1/12		<p>MARTA NATALIE McCONNELL, daughter, is petitioner.</p> <p>40 days since DOD</p> <p>No other proceedings.</p> <p>Will dated: 6/1/2004 – devises entire estate to Marta Natalie McConnell.</p> <p>I & A - \$75,000.00</p> <p>Petitioner requests Court determination that Decedent's 100% interest in real property located at 1545 W. Yale in Fresno passes to her pursuant to the Decedent's Will.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Inventory and appraisal is incomplete at #3, all or a portion of the property, #4, probate referee and #5, property tax certificate.</p>
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		Reviewed by: KT	
		Reviewed on: 8/21/12	
		Updates:	
		Recommendation:	
		File 8 - Marsuobian	

Over the years the daily administration of the trusts had been conducted part-time by regional center staff that was also tasked with normal regional center business. During that period, the Inland Regional Center had been able to absorb the additional costs of providing these trust services. Due to the growth in the number of trusts and the increased complexity of the administration of the trusts it became a necessity for the Master Trust of California to hire a professional Trust Officer who would be able to devote his full time to management of the trust program. Therefore, in April 2005, it became necessary to increase the fees for the first time in 25 years.

The next change to the fee schedule occurred on 11/11/08 when a multi-tiered fee schedule was adopted which reduced fees for trusts with holdings over \$300,000.00. Due to worsening budget problems faced by the State of California over the last several years, it has become necessary for the Master Trust of California to become more self-sufficient. As of 07/01/12, the staffing will change from 1 full time trust officer and 1 full time assistant to the trust officer, 1 full time regional case worker and 2 part time regional center case workers to 1 full time trust officer and 1 assistant and 2 full time regional center case workers. In anticipation of this change, fees were increased as of 02/14/12 for the first \$50,000.00 of a trust's financial holdings. The Master Trust of California utilizes specialized regional center case workers, who are knowledgeable in case management and of how the trust program works, that are assigned to interact and assist the trust beneficiaries. They routinely visit the trust beneficiaries to interact and assist them in the requests for funds from the trust. This eliminates the need to utilize care managers to assist in the management of the trusts. The Master Trust does not charge for additional case management on each trust.

The Master Trust of California provides trust services only to clients who are receiving services from one of the California Regional Centers. There are currently approximately 240 active trusts with a balance in the pooled fund of \$17,609,013 as of 04/30/12. The average trust size is \$73,677.88. Over half of the trusts have a balance less than \$50,000.00 and 35 of the trusts have balances under \$10,000.00. The Trust manager actively seeks ways to distribute the smaller trusts without adversely affecting the beneficiary's public benefits. The new fee schedule should generate revenue that is close to the breakeven point. Much of the fee schedule is driven by two factors: 1) the average balance of \$73,677.88 is considered small. Trust balances under \$100,000.00 is considered too small for many institutions that provide trust services. By accepting and managing smaller balances, the Master Trust is providing a badly needed service of providing professional trust services to the clients of the CA Regional Center system; and 2) There are several pooled special needs trusts in the state of California, each with its own management fee schedule. One of factors affecting the management fee schedule is if the fund has a retention clause in the trust agreement that enables them to retain assets from closing trusts. This retention of funds allows the funds to create an endowment fund to help keep the management fees down. Because the Trustee for the Master Trust of California is Inland Counties Regional Center, Inc., and the Master Trust Committee is a standing committee of the Board of Trustee, the Board has determined that any retention language in our trust documents would be a conflict of interest.

The trust officer for the Master Trust of California is a professional Trust Officer who has many years of Personal Trust and Investment Compliance and Trust administration experience with a major national bank prior to joining the Master Trust of California. He is a Certified Trust and Financial Advisor (CTFA) in good standing. CTFA is a professional credential offered by the American Bankers Association for financial professionals. The designation requires a minimum of 3 years experience, completion of a trust training program and 45 credits of continuing education must be completed every 3 years. Mr. Britton asserts that you will find very few trustees outside the Master Trust of California that are able to provide this level of trust management expertise for special needs trusts, whether they be in a pooled fund or the trustee is an individual.

Continued on Page 3

Declaration of Matthew F. Bahr filed 06/20/12 includes an itemization of the services he rendered and the time spent on behalf of the trust estate. Mr. Bahr states that he has not previously billed for these items and has deeply discounted his fees, requesting only \$1,200.00 in fees for \$2,600.00 in work performed. He is now requesting fees in the amount of \$1,880.00.

Supplemental Declaration of Robert Britton filed 07/23/12 states: The fees charged by the Master Trust of California to administer and service the Appleton Special Needs Trust for last year was \$326.26 (1st Quarter), \$326.50 (2nd Quarter), \$313.57 (3rd Quarter), and \$317.51 (4th Quarter), for a total of \$1,283.84. The Master Trust of California receives no other compensation from the Appleton Trust and does not request additional fees for the social workers who visit the clients and coordinate disbursements for their needs. The Master Trust of California utilizes specialized regional center case workers who are knowledgeable in case management and of how the trust program works, that are assigned to interact and assist the trust beneficiaries. They routinely visit the trust beneficiaries to interact with them and assist them in their requests for funds from the trust. They present the requests for funds to the Master Trust Committee and, in some cases, they make purchases and deliver the items to the trust beneficiaries. Therefore, there is no need for the Master Trust of California to utilize care managers to assist in the management of the trusts. The Master Trust does **not charge** for additional case management on each trust, it is built into the set Fee Schedule. [Emphasis in original]

Second Supplemental Declaration of Robert Britton filed 08/15/15 states: The fees charged by the Master Trust of California to administer and service the Appleton Special Needs Trust during the Fourth Accounting period were as follows: 1st Quarter - \$326.26; 2nd Quarter - \$326.50; 3rd Quarter - \$313.57; and 4th Quarter - \$317.51. The Master Trust of California receives no other compensation from the State of California. The Master Trust is exclusively funded by fees charged to the Trusts. The Investment Fee information for 2011 for the entire pooled Trusts was \$40,017.51 which represents .2087% of the pooled fund balance as of 12/31/11 of \$19,179,133.13. Due to the size of the pooled fund, the investment fee is very reasonable. Merrill Lynch has been the Investment Advisor for the Master Trust. Mr. Britton states that he does not have fee schedules for other pooled funds but, comparing fee schedules for pooled funds can be comparing apples and oranges. It is his understanding that the only pooled funds in California that do not have a mandatory retention clause in their agreements is the Golden State Pooled Trust and the Master Trust of California. It is his understanding that the Good Shepherd Pooled Fund has a 100% retention clause and it is also his understanding that they have a large endowment that allows them to charge lower fees. The Master Trust does not have a mandatory retention clause in the pooled fund agreements and does not have a large endowment fund to help fund its operations.

Status Hearing Re: Amended/Issuance of Letters

DOD: 7/29/2010		<p>FRANK SCOTT HINE, brother, was appointed Administrator with bond set at \$118,260.00 on 1/5/2011.</p> <p>Bond was filed on 8/10/12.</p> <p>Letters have NOT issued.</p> <p>Creditor's claims totaling \$39,051.68 have been filed in this case.</p> <p>Inventory and appraisal filed on 6/6/2012 showing the estate valued at \$134,550.00.</p> <p>The sole beneficiary of this estate appears to be the decedent's 15 year old daughter.</p> <p>Minute Order dated 6/15/12 states Counsel informs the Court that he has the inventory and appraisal on file now. The Court sets the bond at \$45,000.00 and directs that the letters be amended to reflect limited authority and require confirmation of sale.</p> <p>Declaration of Randolph Krbechek regarding hearing on bond filed on 7/16/12 states they submitted a bond application to the insurance company H.M. Vreeland & Sons. The Vreeland agency has informed they that the bond will be issued. However, the Vreeland agency requires that the client and Mr. Krbechek establish a joint control account to handle any funds that come into the possession of Mr. Hine as Administrator. Mr. Krbechek is currently obtaining Mr. Hine's notarized signature on the Joint Control Agreement, so that they can submit it to the Vreeland agency. Mr. Krbechek anticipates that they will be completed by July 19, 2012.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Letters to Issue.</p> <p><u>Note:</u> Mr. Krbechek substituted in on 4/4/12.</p>
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		<p>Reviewed by: KT</p> <p>Reviewed on: 8/21/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 10 - Hine</p>	

Status Hearing Re: Filing of the First Account or Petition for Final Distribution

DOD:3/20/2010		<p>SANDRA DE MEO was appointed Administrator without bond and with Limited IAEA authority on 7/14/11.</p> <p>Letters issued on 7/14/11.</p> <p>I & A - \$79,000.00</p> <p>Order Confirming Sale of Real property was entered on 12/20/2011. The order set a bond at \$53,000.00</p> <p>Bond filed on 12/14/11.</p> <p>This status hearing was set by Minute Order dated 7/14/11.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need First Account, Petition for Final Distribution or current status report.</p>	
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FTB Notice				
				Reviewed by: KT
				Reviewed on: 3/21/12
				Updates:
		Recommendation:		
		File 11 - Graham		

Age: 34 years		<p style="text-align: center;">THERE IS NO TEMPORARY. No temporary was requested.</p> <p>LETICIA STALLINGS, mother, is petitioner and requests appointment as conservator of the person with medical consent powers.</p> <p>Capacity Declaration filed 8/20/12</p> <p>Voting rights affected.</p> <p>Petitioner states at age 28 the proposed conservatee suffered a severe irreversible brain injury in connection with surgery. This has left him non-ambulatory, generally confined to bed, unable to care for himself and unable to communicate verbally or respond to questions and he is totally dependent on others for his care and feeding. As a result of the injury a guardianship of the persona and a conservatorship of the estate were established in Georgia, where the proposed conservatee was residing at the time. The conservatee's father, Arthur Stallings was appointed guardian and conservator in Georgia. The proposed conservatee subsequently moved to California to be close to family members. The proposed conservatee has no California conservator.</p> <p>Court Investigator Jennifer Young's Report filed 8/16/12.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator Advised Rights on 8/15/12.</p> <p>Voting Rights Affected need Minute Order.</p>	
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		<p>Reviewed by: KT</p> <p>Reviewed on: 8/22/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 12 - Stallings</p>		

Order to Show Cause Re: Failure to Appear; Failure to File the First Account

Age: 4 years	<p>TERI LYN JACKSON, Mother, was appointed Guardian of the Estate on 10-12-10.</p> <p>The first account was settled on 2-2-12. Property on hand at the end of the first account period was \$747,076.63 (held in blocked accounts).</p> <p>At the hearing on Attorney Rhames-Childs Petition to be Relieved as Counsel (6/20/12) the court set a status hearing and ordered Ms. Jackson to be personally present. A copy of the minute order was mailed to Teri Jackson on 6/22/12.</p> <p>7/27/12 Status Hearing Minute Order states, no appearances. The Court sets the matter for an Order to Show Cause on 8/23/12 regarding the failure to appear and file the first account. Teri Jackson is ordered to be personally present on 8/23/12. Order to Show Cause was mailed to Teri Jackson on 7/27/12.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Guardian, Teri Lyn Jackson, was formerly represented by Erin Rhames-Childs. Motion to be Relieved as Counsel was granted on 6/20/12.</p> <p>Note: Per Minute Order 2-2-12, a status hearing for the filing of the next accounting is set for 4/17/2014.</p>
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		<p>Reviewed by: KT</p> <p>Reviewed on: 8/22/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13 - Pelley</p>

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

Age: 18 years	<p>THERE IS NO TEMPORARY. No temporary was requested.</p> <p>JAMED DOCKWEILER and ROXANNE DOCKWEILER, parents are petitioner and request appointment as conservator of the person with medical consent powers.</p> <p>Declaration of George Gonzalez, M.D., 6/14/12 supports the request for medical consent powers.</p> <p>Voting Rights are affected.</p> <p>Petitioners state the proposed conservatee is diagnoses with cerebral palsy and severe mental retardation. The proposed conservatee has the cognitive ability of a two year old. She is not able to feed, bathe or care for herself in any manner and is never left unsupervised.</p> <p>Court Investigator Charlotte Bien's Report filed on 8/8/12.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator Advised Rights on 7/31/12.</p> <p>Voting Rights Affected need Minute Order.</p>	
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<p>Reviewed by: KT</p> <p>Reviewed on: 8/23/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 14 - Dockweiler</p>			

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

Age: 16 DOB: 08/01/96		<u>TEMPORARY EXPIRES 08/23/12</u>		NEEDS/PROBLEMS/COMMENTS: 1. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for: - Paternal grandfather (unknown)
		MICHELLE GUERRERO , non-relative, is Petitioner.		
		Father: ROBERT DELACRUZ – <i>deceased</i>		
Cont. from		Mother: VIKKIE PHILLIPS – <i>Consent & Waiver of Notice filed 06/25/12</i>		
<input type="checkbox"/>	Aff.Sub.Wit.			
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<input type="checkbox"/>	Inventory	Paternal grandfather: JOHN DELACRUZ – <i>deceased</i> Paternal grandmother: RITA McCOY – <i>Consent & Waiver of Notice filed 06/25/12</i>		
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg	Maternal grandfather: UNKNOWN Maternal grandmother: DECEASED		
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<input type="checkbox"/>	Pers.Serv.	n/a	Siblings: ROBERT DELACRUZ – <i>Consent & Waiver of Notice filed 06/25/12</i> , ANGIE PERALTA and JOEY PERALTA – <i>both served by mail on 07/31/12</i> ; MICHAEL PERALTA - <i>Declaration of Due Diligence filed 08/06/12</i>	
<input checked="" type="checkbox"/>	Conf. Screen			
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<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections	Minor, Gabriel DeLaCruz signed a Consent & Waiver of Notice filed 06/25/12		
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report	Petitioner states her son is Gabriel's half-brother. Gabriel's father is deceased and his mother is currently in jail and has a history of drug abuse and criminal activity.		
<input type="checkbox"/>	9202			
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<input checked="" type="checkbox"/>	UCCJEA	Court Investigator Charlotte Bien filed a report on 08/02/12.		
<input type="checkbox"/>	Citation			
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				Reviewed by: JF
				Reviewed on: 08/21/12
				Updates:
				Recommendation:
				File 15 - DeLaCruz

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Age: 16 DOB: 12/01/95	<u>GENERAL HEARING 10/11/12</u>	NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 2. Need proof of personal service at least 5 court days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Temporary Guardian of the Person <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: - Angela Wilkins (mother) - Nacio Delgado, Jr. (father)* *Unless diligence is found; Declaration of Due Diligence filed 08/09/12.
	AMBER LOPEZ , non-relative, is Petitioner. Father: IGNACIO DELGADO, Jr. – Declaration of Due Diligence filed 08/09/12 Mother: ANGELA WILKINS Paternal grandfather: IGNACIO DELGADO, SR. Paternal grandmother: UNKNOWN Maternal grandfather: PHIL WILKINS – deceased Maternal grandmother: KATHLEEN WILKINS – deceased Alyssa Delgado signed the Consent & Waiver of Notice on 08/09/12; filed 08/09/12. Petitioner states that she has known the minor nearly all her life and was in a relationship with the minor's mother for several years. Petitioner's son and the minor consider themselves to be brother and sister. Petitioner states that the minor's mother moved to Oregon with her new partner abandoning the minor here without clothing, food or shelter. The mother has made it clear that she does not want to return to Fresno. The minor's father has never been a part of her life and attempts to locate him have been unsuccessful.	
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 <input checked="" type="checkbox"/> x <input type="checkbox"/> Aff.Mail <input type="checkbox"/> Aff.Pub. <input type="checkbox"/> Sp.Ntc. <input type="checkbox"/> Pers.Serv. <input checked="" type="checkbox"/> 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	Declaration of Alyssa Delgado, minor, filed 08/09/12 states that she does not feel safe with her mother because she is a meth addict and has provided drugs to the minor in the past. Alyssa states that she wants to stay here away from her mother so that she can be safe and sober and feels that if she has to go back with her mother, she will not be able to reach the goals she has in life. Alyssa also states that her mother was physically abusive to her as well.	Reviewed by: JF Reviewed on: 08/22/12 Updates: Recommendation: File 17 - Delgado