

**1 Raffi Leon George (Estate) Case No. 04CEPR01552**

**Attorney Simonian, Jeffrey D (for Leon Y. George and Armen L. George – Administrators)**

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

	<p><b>LEON Y. GEORGE</b>, father, and <b>ARMEN L. GEORGE</b>, brother, were appointed as Co-Administrators with Full IAEA without bond and Letters issued on 1-25-05.</p> <p><b>Inventory and Appraisal Partial No. 1</b> was filed on <b>01/09/2015</b> indicating real property valued at \$160,000.00 and personal property valued at \$1,500.00.</p> <p><b>Final Inventory and Appraisal Partial No. 2</b> was filed <b>04/20/2015</b> indicating personal property valued at \$139,728.83</p> <p>No accounting or petition for final distribution was ever filed pursuant to Probate Code §12200.</p> <p>Minute Order of 04/20/2015 set this status hearing. Minute Order states: Mr. Simonian represents that he has the completed Final Inventory and Appraisal with him and he will file it directly after this proceeding. Mr. George requests 45 days; the OSC is vacated. If the petition is filed at least two court days prior, then no appearance is necessary on 06/15/2015.</p> <p><b>Status Report filed 07/10/2015 for previous status hearing states</b> Co-Administrator, Leon Y George died on 04/10/2015. Armen L. George continues as the surviving Co-Administrator of the Decedent's estate. An Inventory and Appraisal – Partial No. 1 listing the real property and personal effects of the Decedent has been completed and returned by the Probate Referee and has been filed with this Court. The Inventory and Appraisal – Partial No. 2 (Final) listing the securities held by the Decedent at date of death has been completed and returned by the Probate Referee and has been filed with this Court. The decedent's personal income tax returns for the calendar year ending 2004 have been completed and filed.</p> <p><b>Please see additional page</b></p>	<p><b>NEEDS/PROBLEMS/COMMENT S:</b></p> <p><b>Minute Order of 06/15/2015: Additional time is needed for the processing of the tax returns so that the final tax liabilities of the decedent can be determined and to allow for resolution of the claim of the Franchise Tax Board. Mr. Simonian requests six weeks.</b></p> <p>1. Need First Account or 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: 061515, 071615		
Aff.Sub.Wit.		
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FTB Notice		
		<b>Reviewed by: LV</b>
		<b>Reviewed on: 08/18/2015</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 1 - George</b>

**Continued from previous page:** The Franchise Tax Board and Internal Revenue Service are still processing the returns and are at the present time unable to provide information to determine the tax liabilities, penalties and interest associated with the Decedent's final personal income tax returns which is necessary for filing the Petition for Final Distribution. Attached are copies of correspondence to the Internal Revenue Service and the Franchise Tax Board requesting information concerning the expected processing times for the returns and when it can be expected that a determination of the outstanding tax liabilities, penalties and interest owed by the Decedent's estate associated with the Decedent's final personal income tax returns can be made. No communications from either the Internal Revenue Service or the Franchise Tax Board have been received concerning Attorney Simonian's request.

Additional time is needed to close the Decedent's estate to allow for the processing of these returns so that the final tax liabilities of the Decedent can be determined and to allow for resolution of the claim of the Franchise Tax Board. It is anticipated that these issues can be resolved and the Petition for Final Distribution filed within the next 6 weeks.

Petitioner Salvador Torres (Pro Per Guardian)

Petition for Termination of Guardianship

		<p><b>SALVADOR TORRES</b>, paternal uncle and Guardian appointed on 12/4/2006, is Petitioner.</p> <p align="center">~Please see Petition for details~</p> <p>Court Investigator's Report was filed on 8/17/.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> This <i>Petition for Termination</i> pertains to Mariah Torres <b>only</b>. Siblings Monica Torres and Manuel Torres are over the age of 18 and are no longer under guardianship.</p> <p>1. Pursuant to Probate Code §§1601, 1460(a) and (b), and 1510(c), need <i>Notice of Hearing</i> and proof of service by mail of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Termination of Guardianship</i>, or <i>Consent to Termination and Waiver of Notice</i>, or a <i>Declaration of Due Diligence</i>, for:</p> <ul style="list-style-type: none"> <li>• Priscilla Ramirez, mother, if Court does not find diligence per Declaration filed 6/24/2015.</li> <li>• Manuel Torrez, father, if Court does not find diligence per Declaration filed 6/24/2015.</li> <li>• Mariah N. Torres, ward;</li> <li>• Salvador Torres, II, paternal grandfather;</li> <li>• Amelia Torres, paternal grandmother;</li> <li>• Ruben Ramirez, maternal grandmother;</li> <li>• Eva Ramirez, maternal grandmother;</li> <li>• Monica Torres, sibling (age 21);</li> <li>• Manuel Torres, sibling (age 19).</li> </ul>	
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<input checked="" type="checkbox"/>	Order			
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<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		Reviewed by: LEG		
		Reviewed on: 8/18/15		
		Updates:		
		Recommendation:		
		File 2 – Torres		

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

<b>DOD: 09/05/06</b>	<p><b>ELIZABETH FELIX</b>, daughter, was appointed Administrator with full IAEA and without bond on 03/20/07. Letters of Administration were issued on 03/21/07.</p> <p>Final Inventory &amp; Appraisal filed 04/13/07- \$160,000.00</p> <p><b>Notice of Status Hearing</b> filed 07/17/13 set this matter for status on 09/06/13.</p> <p><b>Status Report filed 08/19/15</b> states: The estate has not received the funds from the sale of real property by the Fresno County Tax Collector. The funds have not been released by the Fresno County Supervisors. This matter is set to be approved before the Board of Supervisors on 09/01/15. The reason for the delay is stated to be contributed to the building water issue that required the closing of the building. If approved on 09/01/15, in accordance with state law, the County Tax Collector's Office would need to wait an additional 90 days before payment could be made.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u><b>CONTINUED FROM 01/12/15</b></u></p> <p>1. Need Account/Report on Waiver of Account and Petition for Final Distribution and/or current verified status report.</p>
<b>Cont. from 090613 101113, 101714, 111714, 011215</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
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<b>CI Report</b>		
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<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 08/18/15</p> <p><b>Updates:</b> 08/20/15</p> <p><b>Recommendation:</b></p> <p><b>File 3 – Estrada</b></p>

**4A Taylor Cheek & Byron Cheek (GUARD/P) Case No. 08CEPR00940**

Attorney Mathes, Karen L. (for Linda & Terry Cheek – Guardians/Objectors)

Attorney Ruiz, Richard A. (for Tania Cheek – Petitioner)

**Petition for Termination of Guardianship**

Taylor, 12	TANIA CHEEK, mother, is Petitioner.		<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <p>1. Need proof of service by mail at least 15 days before the hearing if <i>Notice of Hearing</i> with a copy of the <i>Petition for Termination of Guardianship</i> <u>or</u> <i>Consent &amp; Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for:</p> <p>A. James Kennedy (maternal grandfather)</p>
Byron, 10	LINDA CHEEK and TERRY CHEEK, paternal grandparents, were appointed as Guardians on 12/01/08.		
	Father: <b>MICHAEL CHEEK</b>		
	Maternal grandfather: JAMES KENNEDY Maternal grandmother: DECEASED		
Cont. from	<b>Petitioner states</b> [see file for details].		
<input type="checkbox"/> Aff.Sub.Wit.	<b>Guardians' Objections to Petition for Termination of Guardianship</b> filed 08/17/15 states [see file for details].		
<input checked="" type="checkbox"/> Verified	<b>Court Investigator Jennifer Daniel</b> filed a report on 08/19/15.		
<input type="checkbox"/> Inventory			
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<input checked="" type="checkbox"/> CI Report			
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<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
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<input type="checkbox"/> FTB Notice			
			Reviewed by: JF
			Reviewed on: 08/19/15
			Updates:
			Recommendation:
			File 4A – Cheek

		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Confidential</u></p>
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<input type="checkbox"/>	Aff.Sub.Wit.	
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<input type="checkbox"/>	UCCJEA	
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<input type="checkbox"/>	FTB Notice	
		Reviewed by: JF
		Reviewed on: 08/20/15
		Updates:
		Recommendation:
		File 4B – Cheek

**4C Taylor Cheek & Byron Cheek (GUARD/P) Case No. 08CEPR00940**

Attorney Mathes, Karen L. (for Linda & Terry Cheek – Guardians/Objectors)  
 Attorney Ruiz, Richard A. (for Tania Cheek – Petitioner)  
**Petition for Visitation**

<b>Taylor, 12</b>	<b>TANIA CHEEK</b> , mother, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note:</b> Guardians/Objectors' filed a Notice of Intent to Request a Continuance on 08/18/15.
<b>Byron, 10</b>	<b>LINDA CHEEK</b> and <b>TERRY CHEEK</b> , paternal grandparents, were appointed as Guardians on 12/01/08.	
<b>Cont. from</b>	<b>Petitioner requests</b> unsupervised visitation with her children pending the outcome of her Petition to Terminate the Guardianship.	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	<b>Petitioner states</b> [see file for details].	
<input checked="" type="checkbox"/> <b>Verified</b>	<b>Guardians' Objections to Petition for Termination of Guardianship</b> filed 08/17/15 states [see file for details].	
<input type="checkbox"/> <b>Inventory</b>	<b>Court Investigator Jennifer Daniel filed a report on 08/19/15</b>	
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		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 08/19/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 4C – Cheek</b>

		See petition, objections for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Note:</u> Nothing further has been filed in connection with this petition as of 8/18/15.  <u>Note:</u> Page B is the Former Conservator's Third Amended First Account filed 6/10/15.  <u>Note:</u> Deborah Boyett, Court appointed attorney for Conservatee, filed Notice of Non-Opposition on 5/29/15.  1. Petitioner requests compensation from the conservatorship estate for services in connection with the conservatee's trust. The Court may require clarification or payment from the trust rather than the conservatorship estate.	
Cont. from 050515, 060215, 061215, 072015				
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	UCCJEA			
	Citation			
	FTB Notice			
		Reviewed by: skc		
		Reviewed on: 8/18/15		
		Updates:		
		Recommendation:		
		File 5A - Bingham		

**Third Amended First and Final Account and Report of Conservator and Petition for Allowance of Compensation to Conservator and Attorneys' Fees and Costs**

		<p><b>JOAN ST. LOUIS</b>, Former Conservator with bond of \$50,000.00, is Petitioner.</p> <p><b>Account period: 11/15/12 – 12/31/14</b>          Accounting*: \$557,542.00 \$556,173.59          Beginning POH: \$342,061.57          Ending POH: <del>\$133,915.94 (\$118,006.86 cash plus personal property valued at \$15,909.08.)</del>          Ending POH*: \$378,789.91 (\$118,006.86 cash plus non-cash assets including an IRA, household items, a vehicle, and certain jewelry)          *Per Third Errata filed 8/3/15</p> <p><b>Petitioner states</b> all conservatorship assets were turned over to Successor Conservator Randy Grace on 1/2/15.</p> <p><b>Conservator: \$29,303.76</b> (\$17,665.66, plus mileage of \$3,447.10 and reimbursement of \$8,191.00 as set forth in the petition for various grocery and other cash value cards)</p> <p><b>Attorney: \$16,597.50</b> (\$15,277.50 plus additional costs of \$1,320.00 for estimated time in connection with the hearings) Petitioner's attorney has filed a petition for attorney's fees requesting \$50,120.00 plus costs of \$2,097.00. By way of this petition, Mr. Roberts is also requesting \$15,277.50 for the period from 2/21/15 through 6/10/15, including an additional four hours in preparing for and attending the hearings, etc.</p> <p><b>Costs: \$435.00 plus \$60.00</b> (for filing this petition plus an ex parte filing)</p> <p><b>See also declarations of David Roberts and Joan St. Louis.</b></p> <p><b>Petitioner prays for an order an judgment as follows:</b></p> <ol style="list-style-type: none"> <li>1. Settling and allowing the Third Amended First Account and Report;</li> <li>2. Approving and confirming the acts of Petitioner as Conservator of the Person and Estate of Wanda H. Bingham;</li> <li>3. Allowing the sum of \$17,665.00 to be paid to Petitioner from the Survivor's Trust as compensation for her services rendered to the Conservatorship and \$3,447.10 from the Survivor's Trust for mileage reimbursement to Joan St. Louis;</li> <li>4. Allowing the sum of \$16,597.50 to be paid to Lang, Richert &amp; Patch from the Survivor's Trust for legal services rendered from 2/21/15 through 6/10/15 (and post filing fees);</li> <li>5. Allowing the sum of \$495.00 to be paid to Lang, Richert &amp; Patch from the Survivor's Trust as reimbursement of costs advanced to the conservatorship estate during this period.</li> </ol>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note: Objection was filed 7/16/15 by Randy Grace, current conservator and Co-Trustee, with Joinder to Objection filed by Wells Fargo Bank, NA, Co-Trustee.</b></p> <p><b>Note: Third Errata filed 8/3/15 provides revised summary and schedules. Objections to the Third Errata were filed 8/17/15.</b></p> <p><b><u>SEE ADDITIONAL PAGES</u></b></p>
<b>Cont. from 072015</b>			
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
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✓	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
✓	<b>2620(c)</b>		
✓	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
			<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 8/18/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b> File 5B – Bingham</p>

**Page 2 - NEEDS/PROBLEMS/COMMENTS (Updated):**

1. **Third Errata provides complete amended summary and schedules, with brief explanation in accompanying declaration. Upon cursory review, it appears that the Ending POH figure for non-cash assets is inconsistent with the accompanying schedule. Therefore, it appears the account does not balance. Further, it does not appear appropriate to include the difference between the carry value and market value of an asset that has not been sold as a credit/loss. There may be additional issues as noted in the Objection. Examiner has not reviewed in depth due to the initial appearance that the account does not balance.**

**Objection filed 7/16/15 details various additional deficiencies including use of incorrect/inconsistent values. See Objections for specifics. Objection also objects to compensation requested by the conservator and the attorney.**

Objector notes discrepancy between alleged services and Right At Home records. Right at Home is the company providing in-home care, and they maintain daily logs regarding the conservatee's care, meals, activities, visitors, phone calls, etc. Objector cross-referenced the dates Ms. St. Louis claims she visited and for which she requests compensation. The Right At Home logs do not support all of Ms. St. Louis' purported services. Objector extends Ms. St. Louis the benefit of the doubt on dates that are off by a day, but provides numerous examples of other inconsistencies, including days when visits were planned but cancelled, or claimed, but not corroborated.

Re attorney fees: Objector states that while Mr. Roberts expended significant time in preparation of the accounting, Objector contends this was because of inexperience, and Mr. Roberts cannot justify charging the conservatorship estate to educate himself and his staff about conservatorship accountings. Despite four attempts, Mr. Roberts has yet to file an accounting that complies with the code. Put simply, the fees sought have not achieved any results but to cost the conservatorship estate money. With each attempt, the court appointed attorney for the Conservatee, the successor conservator and his counsel, and the co-trustees of the trust have had to review and object, which further expends the conservatee's assets. The Conservatee has not received any benefit by the inability of Mr. Roberts to submit a proper accounting.

**Objector requests:**

1. **That Ms. St. Louis' request to allow and settle her account be denied;**
2. **That Ms. St. Louis' request to approve her acts as conservator be denied;**
3. **That Ms. St. Louis' request for compensation and mileage be denied or reduced;**
4. **That Ms. St. Louis' request to allow her attorney compensation be denied or reduced.**

**Note: See Page 3 re Objection to Third Errata filed 8/17/15.**

**SEE ADDITIONAL PAGES**

Page 3

Objection to Third Errata filed 8/17/15 details multiple issues with the revised schedules provided and states at this juncture, it is clear that Ms. St. Louis does not understand probate accounting and Objector has little confidence that this can be cured. The conservatorship estate cannot finance this education. Objector has objected to both Mr. Roberts' and Ms. St. Louis' requests for fees. No effort is made to address those objections in the Third Errata. Objector incorporates those objections herein and submits the failure of the parties to address the objections reflects their inability to explain the issues previously raised by Objector. Objector is prepared to submit the issue of fees on the existing pleadings as having an evidentiary hearing on the issue is only going to further diminish Mrs. Bingham's assets. In the interest of stopping the bleeding, Objector proposes that the accounting be denied and that all fees also be denied. Objector submits there should be a surcharge against Ms. St. Louis' and/or Mr. Roberts' fees to offset the fees incurred by the other attorneys involved in this matter who are being paid by Mrs. Bingham to deal with this persistent incompetence.

Provided the Court is willing to disallow all compensation in connection with preparation of the accounting, Objector proposes that he prepare an accounting covering Ms. St. Louis' time as conservator through his first year as conservator. Assuming no breaches are concealed in what has been submitted to the court, it should be easy (and inexpensive compared to the approx. \$25,000.00 Mr. Roberts seeks for his work in this regard) to present the court with an appropriate accounting.'

If the Court makes this order, Objector requests that Ms. St. Louis be ordered to turn over all source documents pertaining to the conservatorship assets within 15 days.

Objector requests:

1. That the accounting be denied;
2. The acts of Ms. St. Louis as conservator not be approved;
3. All compensation for Ms. St. Louis be denied or in the alternative a surcharge for such amount be ordered by the court;
4. All compensation Mr. Roberts be denied;
5. Objector Randy Grace be ordered to prepare an accounting on behalf of Ms. St. Louis in accordance with the Probate Code;
6. For such other orders as the Court deems just and proper.

**6A Nathaniel Collins & Malichi Collins (GUARD/P) Case No. 12CEPR00561**

Petitioner Collins, Angelina Denise (pro per – mother)

Petition Visitation

Nathaniel, 5		ANGELINA D. COLLINS, mother, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
Malichi, 4			
		LANA PRATT, maternal grandmother, was appointed Guardian on 11/26/12.	1. Need <i>Notice of Hearing</i> .
Cont. from 080415		Father: NATHANIEL COMENGER	2. 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 Termination of Guardianship or Consent &amp; Waiver of Notice or Declaration of Due Diligence</i> for:
Aff.Sub.Wit.			
✓ Verified		Paternal grandmother: NOT LISTED	a. Lana Pratt (maternal grandmother/guardian)
Inventory		Maternal grandfather: KURT RICARDO	b. Nathaniel Comenger (father)
PTC			c. Paternal grandparents
Not.Cred.		Petitioner states [see file for details].	d. Kurt Ricardo (maternal grandfather)
Notice of Hrg	x		
Aff.Mail	x		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
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Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
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Order	x		
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Status Rpt			
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Citation			
FTB Notice			
			Reviewed by: JF
			Reviewed on: 8/20/15
			Updates:
			Recommendation:
			File 6A – Collins

6A

**6B Nathaniel Collins & Malichi Collins (GUARD/P) Case No. 12CEPR00561**

Petitioner Collins, Angelina (pro per – mother/Petitioner)

Petition – Terminate Guardianship

Nathaniel, 5		ANGELINA D. COLLINS, mother, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>									
Malichi, 4												
		LANA PRATT, maternal grandmother, was appointed Guardian on 11/26/12.	3. Need <i>Notice of Hearing</i> . 4. 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 Termination of Guardianship or Consent &amp; Waiver of Notice or Declaration of Due Diligence</i> for: e. Lana Pratt (maternal grandmother/guardian) f. Nathaniel Comenger (father) g. Paternal grandparents h. Kurt Ricardo (maternal grandfather)									
Cont. from		Father: NATHANIEL COMENGER										
	Aff.Sub.Wit.	Paternal grandfather: NOT LISTED										
✓	Verified	Paternal grandmother: NOT LISTED										
	Inventory	Maternal grandfather: KURT RICARDO										
	PTC	Petitioner states [see petition for details].										
	Not.Cred.											
	Notice of Hrg	Court Investigator Dina Calvillo filed a report on 08/18/15.										
	Aff.Mail											
	Aff.Pub.	<table border="1"> <tr> <td colspan="2">Reviewed by: JF</td> </tr> <tr> <td colspan="2">Reviewed on: 08/20/15</td> </tr> <tr> <td colspan="2">Updates:</td> </tr> <tr> <td colspan="2">Recommendation:</td> </tr> <tr> <td colspan="2">File 6B – Collins</td> </tr> </table>	Reviewed by: JF		Reviewed on: 08/20/15		Updates:		Recommendation:		File 6B – Collins	
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File 6B – Collins												
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	Conf. Screen											
	Letters											
	Duties/Supp											
	Objections											
	Video Receipt											
✓	CI Report											
	9202											
✓	Order											
	Aff. Posting											
	Status Rpt											
	UCCJEA											
	Citation											
	FTB Notice											

Attorney Boyajian, Thomas M. (for Conservator Irene V. Santos)

**Probate Status Hearing Re: Filing of the Final Account of the Conservatorship**

<b>DOD: 12/8/2014</b>		<p><b>IRENE V. SANTOS</b>, daughter, was appointed Conservator of the Person and Estate on <b>11/8/2012</b> with bond set at <b>\$123,895.00</b>.</p> <p><b>Orders Regarding First Account, Approval of Sale of Depreciating Property, Approval and Allowance for Conservator's and Attorney's Compensation filed 2/26/2015</b> set this status hearing on 8/24/2015 for the filing of the final account of the Conservatorship.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need final account of the Conservatorship estate, or a verified status report and proof of service of notice of the status hearing with a copy of the status report to all interested parties pursuant to Local Rule 7.5(B).</p>
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
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<input type="checkbox"/>	<b>Inventory</b>		
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<input type="checkbox"/>	<b>Video Receipt</b>		
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<input type="checkbox"/>	<b>9202</b>		
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<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
<b>Reviewed by:</b> LEG			
<b>Reviewed on:</b> 8/18/15			
<b>Updates:</b>			
<b>Recommendation:</b>			
<b>File 7 – Murillo</b>			

Petitioner Real, Cassandra A. (pro per – non-relative)

Petitioner Corrales, Tony (pro per – brother)

**Petition for Appointment of Guardian of the Person**

<b>Age:</b> 16	<b><u>TEMPORARY EXPIRES 08/24/15</u></b>	<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <p><b><u>CONTINUED FROM 07/13/15</u></b></p> <p><b>Note:</b> Letter from Dolores Perez (current guardian) attached to petition supports Petitioner's petition to become successor guardians.</p> <p>1. Need proof of service 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> or <i>Consent &amp; Waiver of Notice</i> or <i>Declaration of Due Diligence</i> for:</p> <p>a. Martin Garcia (minor) – <i>personal service</i>; <i>Proof of Service</i> filed 08/10/15 states that Martin was served with the <i>Notice of Hearing</i> and a letter from Dolores, need proof of service of a copy of the <i>Petition for Guardianship</i></p> <p>b. Paternal grandparents – service by mail ok; unless diligence is found. Declaration of Due Diligence filed 08/20/15 states that the address or whereabouts of the paternal grandparents is unknown.</p>
	<p><b>TONY CORRALES</b>, brother, and <b>CASSANDRA REAL</b>, non-relative (brother's girlfriend), are Petitioners.</p> <p><b>DOLORES PEREZ</b>, maternal aunt, was appointed guardian on 11/01/12 – <i>personally served</i> on 05/21/15</p> <p>Father: <b>PEDRO GARCIA</b> - <i>deceased</i></p> <p>Mother: <b>RUBY ZERMENO</b> – <i>Consent &amp; Waiver of Notice</i> filed 08/10/15</p> <p>Paternal grandfather: EMILIANO GARCIA-GUZMAN – <i>Declaration of Due Diligence</i> filed 08/10/15</p> <p>Paternal grandmother: TERESA GARCIA-GUZMAN – <i>Declaration of Due Diligence</i> filed 08/10/15</p> <p>Maternal grandfather: RUBEN CORRALES – <i>deceased</i></p> <p>Maternal grandmother: YVONNE RIOS – <i>Consent &amp; Waiver of Notice</i> filed 08/10/15</p> <p><b>Petitioner states</b> that the current guardian's health is bad and she can't care for Martin anymore. Temporary guardianship is needed for medical care and school.</p> <p><b>Court Investigator Julie Negrete filed a report on 07/06/15.</b></p> <p><b>Court Investigator Julie Negrete filed a Supplemental Report on 08/19/15.</b></p>	
<b>Cont. from 060815, 071315</b>		
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<input type="checkbox"/> <b>Inventory</b>		
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<input type="checkbox"/> <b>Not.Cred.</b>		
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<input type="checkbox"/> <b>Aff.Mail</b> <span style="float: right;">x</span>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b> <span style="float: right;">x</span>		
<input checked="" type="checkbox"/> <b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>		
<input checked="" type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input checked="" type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input checked="" type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 08/18/15</p> <p><b>Updates:</b> 08/20/15</p> <p><b>Recommendation:</b></p> <p><b>File 8A - Garcia</b></p>

Age: 16	CASSANDRA REAL, non-relative (brother's girlfriend), is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>CONTINUED FROM 07/13/15</b>  <b>Minute Order from 07/13/15 states: Examiner notes provided in open court; the Court Investigator needs additional time to complete the investigation. Due to the resignation of Dolores Perez on 04/20/15, the Court appoints Cassandra Real and Tony Corrales as Temporary Guardians; Letters to issue forthwith.</b></p> <p>1. Need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Termination of Guardianship <u>or</u> Consent &amp; Waiver of Notice <u>or</u> Declaration of Due Diligence for:</p> <p>a. Martin Garcia (minor) – personal service; Proof of Service filed 08/10/15 states that Martin was served with the Notice of Hearing and a letter from Dolores, need proof of service of a copy of the Petition for Termination of Guardianship</p> <p>b. Paternal grandparents – service by mail ok; unless diligence is found. Declaration of Due Diligence filed 08/20/15 states that the address or whereabouts of the paternal grandparents is unknown.</p>
	DOLORES PEREZ, maternal aunt, was appointed guardian on 11/01/12	
	Father: PEDRO GARCIA - deceased	
Cont. from 071315	Mother: RUBY ZERMENO – Consent & Waiver of Notice filed 08/10/15	
Aff.Sub.Wit.	Paternal grandfather: EMILIANO GARCIA-GUZMAN – Declaration of Due Diligence filed 08/10/15	
✓ Verified	Paternal grandmother: TERESA GARCIA-GUZMAN – Declaration of Due Diligence filed 08/10/15	
Inventory	Maternal grandfather: RUBEN CORRALES – deceased	
PTC	Maternal grandmother: YVONNE RIOS	
Not.Cred.	Sibling: TONY CORRALES	
✓ Notice of Hrg	<b>Petitioner states</b> that the current guardian's health is bad and she can't care for Martin anymore.	
Aff.Mail	<b>Court Investigator Julie Negrete filed a report on 07/06/15.</b>	
Aff.Pub.	<b>Court Investigator Julie Negrete filed a Supplemental Report on 08/19/15.</b>	
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:** 08/18/15  
**Updates:** 08/24/15  
**Recommendation:**  
**File 8B - Garcia**

Age: 62	<b>TOM AVEDESIAN</b> and <b>LOUISE AVEDESIAN</b> , Co-Trustees, are petitioners.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>The following issues remain:</b></p> <ol style="list-style-type: none"> <li>Disbursements include rent fees in the amount of \$4,456.00. Examples of Trust Distributions that will reduce SSI benefits are housing costs. Housing costs are not a permissible distribution from the Special Needs Trust if they reduce other benefits that the beneficiary could be entitled to. Need to provide justification of paying rent from the Special Needs Trust.</li> <li>Disbursements include a charge in the amount of \$352.00 for "tires for truck" however the property on hand does not list a truck. Need clarification.</li> <li>Need Order.</li> </ol> <p><b>Note:</b> If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> <li><b>Monday, August 23, 2017</b> at 9:00 a.m. in Department 303, for the filing of the second account</li> </ul>
	Account period: 03/28/2014 – 04/15/2015	
	Accounting: <b>\$50,365.25</b>	
Cont. from 072715	Beginning POH: <b>\$50,000.00</b>	
Aff.Sub.Wit.	Ending POH: <b>\$34,456.67</b>	
✓ Verified	Trustee - <b>not</b>	
Inventory	<b>addressed</b>	
PTC	Attorney - <b>\$500.00</b>	
Not.Cred.	Cost - <b>\$200.00</b> (filing fee)	
✓ Notice of Hrg	<b>Petitioners pray for:</b>	
✓ Aff.Mail w/	<ol style="list-style-type: none"> <li>The First Accounting of this special needs trust be approved.</li> <li>Court approve court costs.</li> <li>For such other and further orders as the court may deem proper.</li> </ol>	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order x		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 08/18/2015
		Updates:
		Recommendation:
		File 9 – Kandarian

Petitioner Lopez, Jacob S (Pro Per – Father)

Petition for Termination of Guardianship

Janessa, 3	<p>JACOB SONNY LOPEZ, father, is petitioner.</p> <p><u>Please see petition for details</u></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need Notice of Hearing.</li> <li>2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>• James Lopez (Paternal Grandfather)</li> <li>• Katrina Mason (Maternal Grandmother)</li> </ul> </li> </ol>	
Jenna, 2			
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
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<input type="checkbox"/> Notice of Hrg			x
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<input type="checkbox"/> Letters			
<input type="checkbox"/> Duties/Supp			
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<input type="checkbox"/> Video Receipt			
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<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><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 08/18/2015</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 10 – Lopez</b></p>	

		<p><b>LISA MUNSEY</b>, Daughter and Conservator of the Person and Estate with bond of \$61,581.00, is Petitioner.</p> <p><b>Account period: 7/24/14 – 6/30/15</b> Accounting: \$201,182.47 Beginning POH: \$169,745.90 Ending POH: \$171,047.74 (\$7,516.91 cash plus various personal property, vehicles, furniture, jewelry, tools, and an annuity contract)</p> <p>Conservator waives compensation</p> <p>Attorney: \$1,000.00 (less than local rule)</p> <p>Petitioner requests an order allowing and settling the account and report of conservator as filed and authorizing \$1,000.00 for legal services during the account period.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p style="text-align: center;"><u>SEE PAGE 2</u></p>
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
✓	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b> w		
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
✓	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
✓	<b>2620(c)</b>		
✓	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
		<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 8/19/15</p> <p><b>Updates:</b> 8/20/15</p> <p><b>Recommendation:</b></p> <p><b>File 11 – Munsey</b></p>	

## Page 2 - NEEDS/PROBLEMS/COMMENTS:

1. Need clarification re Disbursements Schedule items C-3, which reflects payments of \$25/month during the account period for a payment plan on an EECU overdraft protection loan, and C-5, which reflects payments of approx. \$85/month on an EECU visa credit card pursuant to Probate Code §§ 1063(g), 1064(a)(1),(2). These appear to be liabilities incurred prior to the establishment of the conservatorship, but the total liability is unclear, and it is unclear if the Conservator is paying the minimum or has a payoff plan.

*Declaration filed 8/20/15 states both debts had balances owing prior to the conservatorship. The overdraft protection loan has been paid off as of June 2015. The credit card had a minimum payment automatic withdrawal set up, and Conservator continued with that plan. The balance as of 7/19/15 was \$4,005.06. The Conservator was not planning on paying this card off in a lump sum as she did not want to deplete the conservatorship funds in case her other had extra health care costs. Should the Court wish for this debt to be paid off in a different manner, Conservator is not adverse to selling some of the personal property to pay off the card.*

2. It appears the conservatee's former residence, valued at \$140,000.00, is being rented for only \$300/month. The Court may require clarification regarding whether the conservatorship estate is receiving fair market value for the property, given that the estate's expenses slightly exceeded receipts during the account period, requiring family members to contribute funds.

*Declaration states the residence is currently rented to the conservatee's adult son who is developmentally disabled. His only source of income is SSI. It was the desire of their parents that he have a place to live. Petitioner pays his monthly utilities from her personal funds as he does not have the means to pay those expenses. She also pays the property taxes for the conservatorship estate. She does this so that her brother has a place to live and so that her mother's funds will not be depleted and she can maintain the excellent level of care she is receiving. Petitioner does not intend to request reimbursement from the conservatorship estate.*

3. Need clarification regarding the mandatory draw taken on the annuity contract pursuant to Probate Code §1064(a)(1). Was this a one-time withdrawal or is this expected to occur on an ongoing or more frequent basis?

*Declaration states because of the conservatee's age, it is anticipated that she will be required to take a mandatory minimum draw annually.*

4. Conservator's current bond of \$61,581.00 appears to be insufficient. Based on the value of the conservatee's assets, less the real property, plus annual income, plus cost of recovery, Examiner calculates that bond should be increased to at least \$100,716.12 (an increase of \$39,135.12) pursuant to Probate Code §2320(c)(4) and Cal. Rule of Court 7.207.

*Declaration states the additional bond will be issued upon court order.*

**Note:** If granted, the Court will set a status hearing for the filing of the Second Account as follows:

- If a one-year account is required, Monday, August 29, 2016
- If a two-year account is required, Monday, August 28, 2017

If the proper items are on file prior to the status hearing date pursuant to Local Rule 7.5, the status hearing will come off calendar.

Notice of Motion and Motion to Be Relieved as Counsel

Age:		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><b><u>OFF CALENDAR</u></b></p> <p>Request for Dismissal entered 8/14/15</p>
DOD:		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
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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: 8/14/15
		Updates:
		Recommendation:
		File 12 – Ratliff

Notice of Motion and Motion to Be Relieved as Counsel

Age:			NEEDS/PROBLEMS/COMMENTS:
DOD:			
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
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<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<b><u>OFF CALENDAR</u></b>	
		Request for Dismissal entered 8/14/15	
		Reviewed by: skc	
		Reviewed on: 8/14/15	
		Updates:	
		Recommendation:	
		File 13 – Ratliff	

**First and Final Report of Executor on Waiver of Account and Petition for Allowance of Compensation to Attorney for Ordinary Services, and for Final Distribution**

<b>DOD:12/28/14</b>		<p><b>CAROL TERRELL</b>, Daughter And Executor with Full IAEA without bond, is Petitioner.</p> <p>Accounting is waived.</p> <p>I&amp;A: \$275,000.00 POH: \$249,415.93 (cash)</p> <p>Executor waives compensation.</p> <p>Attorney (Statutory): \$8,500.00</p> <p>Costs: \$435.00</p> <p>Distribution pursuant to Decedent's will: Carol Terrell: \$240,480.93</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>	
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<input type="checkbox"/>	<b>Duties/Supp</b>			
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<input type="checkbox"/>	<b>CI Report</b>			
<input checked="" type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input checked="" type="checkbox"/>	<b>FTB Notice</b>			
				<b>Reviewed by:</b> skc
			<b>Reviewed on:</b> 8/19/15	
			<b>Updates:</b>	
			<b>Recommendation:</b> SUBMITTED	
			<b>File 14 – Pinner</b>	

Attorney Boyajian, Thomas M. (for Petitioner Jo Anne M. Ling, Executor)

Report of Sale and Petition for Order Confirming Sale of RP

<b>DOD: 12/20/2014</b>	<b>JO ANNE M. LING</b> , daughter and Executor appointed on 3/11/2015 with Full IAEA authority without bond, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need mandatory-use Judicial Council form MC-050, <i>Substitution of Attorney</i>, signed by Attorney <b>MELVIN K. RUBE</b> to be filed with the Court.</li> <li>2. Need proof of 15 days' mailed service of the <i>Notice of Hearing</i> with a copy of the <i>Petition for WELLS FARGO BANK</i>, per the <i>Request for Special Notice</i> filed 7/13/2015 pursuant to Probate Code §§ 10308(c), 1220(a)(2)(B), 1250 and 1252(a).</li> </ol> <p><b>Note:</b> Affidavit of Posting was not completed pursuant to Probate Code § 10308(c). However, Probate Code § 10503 makes clear that sales under independent administration authority are not subject to the statutory requirements that apply to the Court confirmation of a real property sale; thus, the posting of the notice of sale by the Court Clerk is not required when, as here, a sale is made under full IAEA authority. It is unclear whether there exists justification for the filing of this report of sale and petition for confirmation of sale, as the <i>Petition</i> is silent regarding reasons that court-confirmation is sought by Petitioner.</p> <p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 8/19/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 15 – Cambio</b></p>
	Sale Price - <b>\$339,000.00</b>	
	Overbid - <b>\$356,450.00</b>	
<b>Cont. from</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>	Appraisal - <b>\$310,000.00</b> (completed 7/7/2015)	
<input checked="" type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>	Property - <b>8236 Yearling Way Jurupa Valley*, CA</b>	
<input type="checkbox"/> <b>Not.Cred.</b>	(*property address is actually Riverside, CA, in legal description; Jurupa Valley became municipality in 2011 and deed will reflect Jurupa Valley at title change;)	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	Publication - <b>Business Journal</b>	
<input checked="" type="checkbox"/> <b>Aff.Pub.</b>	Buyers - <b>Isidro Juarez and Gabriela Juarez, as husband and wife, [as community prop.]</b>	
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>	Broker - <b>\$16,950.00</b>	
<input type="checkbox"/> <b>Letters</b> 031315	(5% payable 2.5% to Keller-Williams Norco @ \$8,475.00 and 2.5% to Keller-Williams Riverside @ \$8,475.00;)	
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>	Bond - <b>No bond</b> has been posted and no additional bond is needed.	
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>	X	
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		

		See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Note:</u> The Court previously ordered no visits to the mother until she appears in court.  1. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Paternal Grandfather - Paternal Grandmother - Maternal Grandfather Ray Albert Lerma - Maternal Grandmother Carmelita Murillo	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			W
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 8/19/15	
			Updates:	
			Recommendation:	
			File 16 – Garcia	

Petitioner Kenneth Eugene Barger (Pro Per Petitioner, son)

Petition for Probate of Will and for Letters Testamentary

<b>DOD: 4/9/2015</b>	<b>KENNETH RALPH BARGER</b> , son and named Executor without bond, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 7/27/2015.</b> Minute Order states examiner notes provided in open court.</p> <p><b>Note for background:</b> Minute Order dated 6/8/2015 states examiner notes are handed to Mr. Barger in open court. Mr. Barger is admonished not to sell any property before the Court approves the petition.</p> <p>1. It appears based upon the <i>Proof of Service of Notice of Hearing</i> filed 8/12/2015 in response to the previously raised issue that the Decedent's predeceased children, namely <b>WILLIAM EUGENE BARGER</b>, adopted son (DOD 6/25/1991), and <b>JOHN THOMAS BARGER</b>, adopted son (DOD 10/10/2012), had children who survived the Decedent. Need declaration in support of the <i>Petition for Probate</i> to be filed with the Court containing the names, relationships to Decedent, and ages of the following persons:</p> <ul style="list-style-type: none"> <li>• <b>CHRIS BARGER;</b></li> <li>• <b>JESSY BARGER;</b></li> <li>• <b>CODY BARGER;</b></li> <li>• <b>JODY BARGER ANDERSON;</b></li> <li>• <b>BILLY BARGER.</b></li> </ul> <p>~Please see additional page~</p>
<b>Cont. from 060815, 071315, 072715</b>	Full IAEA: OK	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Will Dated: 3/25/2015	
<input checked="" type="checkbox"/> <b>Verified</b>	Residence: Fresno	
<input type="checkbox"/> <b>Inventory</b>	Publication: Business Journal	
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b> N/A		
<input type="checkbox"/> <b>Aff.Mail</b>		
<input checked="" type="checkbox"/> <b>Aff.Pub.</b>	<b>Estimated value of the Estate:</b>	
<input type="checkbox"/> <b>Sp.Ntc.</b>	Real property - \$300,000.00	
<input type="checkbox"/> <b>Pers.Serv.</b>	Personal property - \$ 500.00	
<input type="checkbox"/> <b>Conf. Screen</b>	Total - \$300,500.00	
<input checked="" type="checkbox"/> <b>Letters</b>	<b>Probate Referee: Rick Smith</b>	
<input checked="" type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> LEG
		<b>Reviewed on:</b> 8/18/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 17 – Barger</b>

**Note:** If *Petition* is granted, Court will set Status Hearings as follows:

- **Thursday, January 28, 2016 at 9:00 a.m. in Dept. 303** for the filing of final inventory and appraisal; and
- **Thursday, October 27, 2016 at 9:00 a.m. in Dept. 303** for the filing of first account and/or petition for final distribution.

Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.

<b>Age: 16</b>	<b><u>TEMPORARY EXPIRES 08/24/2015</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>MARIA LOPEZ, maternal aunt, is petitioner.</b>	<b>Minute Order of 07/27/2015: Ms. Lopez is assisted in the Spanish language by her daughter. Examiner notes provided in open court. The Court dispenses with notice as to Cesar Ventura, father; Petitioner just needs to have Rebecca Michel, maternal grandmother, properly served. The Court order temporary orders/letters issue forthwith.</b>
<b>Cont. from 072715</b>	<b><u>Please see petition for details</u></b>	1. Need Notice of Hearing.
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:
<input checked="" type="checkbox"/> <b>Verified</b>		<ul style="list-style-type: none"> <li>• Rebecca Michel (Maternal Grandmother)</li> </ul>
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> <b>Aff.Mail</b>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> <b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>		
<input checked="" type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input checked="" type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input checked="" type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by: LV</b>
		<b>Reviewed on: 08/18/2015</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 18 – Lopez</b>

**Petition for Appointment of Guardian of the Person**

	<b>TEMPORARY EXPIRES 8/24/15</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>DAYNNA WOOD</b> , non-relative, is petitioner	Minute order dated 7/2/15, granting the temporary guardianship, ordered that there was to be no unsupervised or overnight visits for the parents.  1. Petition does not list the names and current addresses of the paternal grandparents or the maternal grandmother.  2. Need proof of service of the Notice of Hearing along with a copy of the petition or Consent and Waiver of Notice or Declaration of Due Diligence on: a. Kenneth Frith (maternal grandfather) b. Maternal grandmother c. Paternal grandparents.
	Please see petition for details.	
	<b>Court Investigator Julie Negrete's Report filed on 8/19/15</b>	
<b>Cont. from</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>		
<input type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input checked="" type="checkbox"/> <b>Pers.Serv.</b> W/		
<input checked="" type="checkbox"/> <b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>		
<input checked="" type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input checked="" type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input checked="" type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by: KT</b>
		<b>Reviewed on: 8/19/15</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 19 – Bryant</b>



Attorney Del Castillo, Thomasito (for Petitioners Sheila Chatman, Ronald Chatmand, Jr., and Maurice Chatman)

**Petition to Determine Succession to Real Property**

<b>DOD: 5/11/2011</b>	<b>SHEILA CHATMAN, RONALD CHATMAN, JR., and MAURICE CHATMAN,</b> grandchildren, are Petitioners.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>Item 9a of the <i>Petition</i> is incomplete as to (4) re: registered domestic partner.</li> <li>Item 14 of the <i>Petition</i> does not list the names, relationships to Decedent, ages and residence or mailing addresses so far as known to or reasonably ascertainable by Petitioner of the following persons who are devisees of Decedent's Will, designated to receive property (the property need not be the subject property): <ul style="list-style-type: none"> <li><b>ARTURO FLORES;</b></li> <li><b>FELICITAS FLORES</b> (Item 14 lists Felicia Flores; unclear whether this is the same person).</li> </ul> </li> <li>Pursuant to Probate Code §§ 13152(a)(7) and 13153, need proof of mailed service of <i>Notice of Hearing</i> for Arturo Flores and Felicitas Flores.</li> <li><i>Attachment 11</i> to the <i>Petition</i> does not state the amount of the Decedent's interest in the real property as required per Item 11 of the <i>Petition</i>.</li> </ol>
<b>Cont. from</b>	40 days since DOD.	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>	No other proceedings.	
<input checked="" type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>	I & A - <b>\$65,000.00</b>	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	W/	
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>	<b>Petitioners request</b> Court determination that Decedent's <b>[unspecified %]</b> interest in real property located at 1214 Bennet Way, Sanger, passes to the Petitioners at 1/3 interest to each pursuant to Decedent's Will.	
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> LEG
		<b>Reviewed on:</b> 8/19/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 21 - Gonzalez</b>

**22 Victoria Maclsaac (Estate) Case No. 15CEPR00691**

**Attorney Camenson, David M. (for Amy Badilla – Daughter – Petitioner)**

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

<b>DOD: 5/29/15</b>		<b>AMY BADILLA</b> , Daughter and named Executor without bond, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> The Court will set status hearings as follows:</p> <ul style="list-style-type: none"> <li>Monday, January 25, 2016 for the filing of the Inventory and Appraisal</li> <li>Monday, October 24, 2016 for the filing of the first account or petition for final distribution.</li> </ul> <p>If the proper items are on file pursuant to Local Rule 7.5, the status hearings may come off calendar.</p>
		Full IAEA – ok	
		Will dated 3/10/15	
	<b>Aff.Sub.Wit.</b>	S/P	
✓	<b>Verified</b>		
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b>	w	
✓	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
✓	<b>Letters</b>		
✓	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
✓	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
			<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 8/19/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b> SUBMITTED</p> <p><b>File 22 – Maclsaac</b></p>

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	<b>TEMPORARY EXPIRES 08/24/15</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>GENERAL HEARING: 09/28/15</b>	
	<b>JUAN ARELLANO GONZALEZ and MARIA G. GONZALEZ, maternal grandparents, are Petitioners.</b>	<b>CONTINUED FROM 08/10/15</b>
Cont. from 081015	Father: <b>JOEL LEON JACOBO</b>	<b>Minute Order from 08/10/15 states:</b>
<input type="checkbox"/> Aff.Sub.Wit.	Mother: <b>ARIANA GONZALEZ – deceased</b>	<b>The Court grants the petition to preserve the status quo; Joel Leon Jacobo, father, must be mailed notice in Mexico and must also be sent a text message regarding these proceedings.</b>
<input checked="" type="checkbox"/> Verified	Paternal grandfather: JUAN LEON	<b>Petitioners are Spanish speaking.</b>
<input type="checkbox"/> Inventory	Paternal grandmother: BERTHA JACOBO	1. Need <i>Notice of Hearing</i> for Temporary Guardianship hearing.
<input type="checkbox"/> PTC	<b>Petitioners state</b> [see Petition for details].	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: a. Joel Leon Jacobo (father)
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input 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		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 08/18/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 23 – Leon</b>



Petitioner Tony Tapia, Jr. (Pro Per Petitioner, maternal grandfather)  
 Petitioner Kimiki S. Tapia (Pro Per Petitioner, maternal aunt)

**Petition for Appointment of Temporary Guardian of the Person**

		<u>General Hearing set for 10/14/2015</u>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		TONY TAPIA, JR., maternal grandfather, and KIMIKI S. TAPIA, maternal aunt, are Petitioners.	
Cont. from		<i>~Please see Petition for details~</i>	<p>1. Need <i>Notice of Hearing</i> and proof of five (5) court days' notice by personal service of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian, or Consent to Appointment of Guardian and Waiver of Notice</i>, for:</p> <ul style="list-style-type: none"> <li>• Eusebia Mireles, father, if Court does not find due diligence per Declaration filed 8/11/2015 and excuse notice as requested.</li> <li>• Crystelle Valenzuela, mother, if Court does not find due diligence per Declaration filed 8/11/2015 and excuse notice as requested.</li> </ul> <p>2. <b>UCCJEA form filed on 8/11/2015 does not provide residence information for the last 5 years as required.</b></p>
<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		
			Reviewed by: LEG
			Reviewed on: 8/19/15
			Updates:
			Recommendation:
			File 25 – Valenzuela