



## ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

**Probate Status Hearing for Failure to File a Petition for Final Distribution.**

	<p><b>JoANN SORIA</b> was appointed as Administrator, with full IAEA authority and without bond, on 11/8/2010.</p> <p>Letters issued on 11/8/2010.</p> <p>The Department of Health Services filed a creditor's claim on 12/12/12 in the amount of \$74,720.18.</p> <p>Inventory and Appraisal filed on 3/11/14 showing the estate valued at \$100,000.00.</p> <p>The Amended Petition for First and Final Account was dismissed on 10/16/14.</p> <p>Notice of Status Hearing filed on 7/17/15 set this hearing re: Failure to File a Petition for Final Distribution.</p> <p>Notice of the Status Hearing was mailed to Robert Bergin and JoAnn Soria on 7/17/15.</p> <p><b>Status Report filed on 8/20/15 states</b> the delay in filing the final report and petition in this estate was the pending lawsuit in the estate of decedent's mother, Anita Lucchesi. A settlement was reached in March 2015. A short time after July 22, 2015, a check was written to the Administrator, and an estate account was opened. Mr. Bergin states he was on vacation for a short time in August, but upon his return prepared the petition for final distribution. A creditor's claim was filed by the Department of Health Care Services. The petition provides that the Department will be paid the net amount of funds remaining in the estate after costs of administration. The petition has been sent to the Department for their approval, and it is anticipated that the attorney will hear back within the next five to seven days. As soon as the approval is signed, it, along with the petition will be filed with the court. <b>It is requested that the status hearing be continued to a date after 9/1/15.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. <b>Need petition for final distribution.</b></p>
<b>Cont. from</b>		
<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>		
<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>		
		<b>Reviewed by: KT</b>
		<b>Reviewed on: 8/21/15</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 2 – Lucchesi</b>

Atty Schacher, Kara, of Paso Robles (for Esperanza S. Boone, Administrator)

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

<b>DOD: 6/15/2012</b>	<b>ESPERANZA S. BOOKE</b> , sister, was appointed Administrator with Full IAEA authority without bond on 1/9/2013.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>Continued from 7/23/2015.</b> Minute Order states counsel represents that the litigation in SLO County has been set out to spring of 2016, but does not have the exact date. The Court orders Ms. Schacher to file a verified declaration as to the exact trial date and attach a copy of the SLO docket page verifying. [Declaration of Attorney filed 8/6/2015 complies with Court's request].
<b>Cont. from: 030714, 040414, 061215, 072315</b>	<b>Letters issued on 1/16/2013.</b>	
<b>Aff.Sub.Wit.</b>	<b>Pursuant to Probate Code § 8800(b),</b> Final Inventory and Appraisal was due <b>5/16/2013.</b>	
✓ <b>Verified</b>		
<b>Inventory</b>	<b>Inventory and Appraisal filed on 8/22/2013</b> shows an estate value of <b>\$0.00</b> , indicating this is a no-asset estate opened in order to allow the personal representative to proceed with a wrongful death claim on behalf of Decedent's heirs.	<b>Note:</b> Prior to the last hearing on 7/23/2015, the Court had not been provided with any concrete demonstration of a pending wrongful death claim since the inception of this case on 11/13/2012. OSC issued 6/12/2015 was dismissed on 7/23/15 based on the representations of Attorney Schacher, who appeared at hearing.
<b>Account</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	<b>Pursuant to Probate Code § 12200</b> , first account and/or petition for final distribution was due <b>1/16/2014.</b>	
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>	<b>Declaration of Attorney filed 8/6/2015 states:</b>	<b>The following issues remain:</b>
<b>Sp.Ntc.</b>	<ul style="list-style-type: none"> <li>She has spoken to <b>ROBERT MAY</b>, Attorney for Esparanza Brook in the Eastern District Court of California, Case [number omitted], and she received a copy of the <i>Order Setting New Dates</i> via email from Mr. May on 7/30/2015, which shows the new trial date in that matter was continued to <b>2/2/2016</b>; (copy of Order attached; copy of email from Robert May with docket text printout also attached);</li> <li>She asks that the status hearing be set thereafter on this matter, and that she be allowed to appear by Courtcall at the hearing on 8/26/2015.</li> </ul>	<ol style="list-style-type: none"> <li>Need Final Inventory and Appraisal pursuant to Probate Code § 8800(b), identifying recovered funds from the litigation proceeding.</li> <li>Need first and final account, or current verified Status Report and proof of service of the Status Report pursuant to Local Rule 7.5(B).</li> </ol>
<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>Reviewed by: LEG</b>
✓ <b>Status Rpt</b>		<b>Reviewed on: 8/24/14</b>
<b>UCCJEA</b>		<b>Updates:</b>
<b>Citation</b>		<b>Recommendation:</b>
<b>FTB Notice</b>		<b>File 3 – Salinas</b>

**Petition for Visitation**

		<p><b>SARA WHITE</b>, mother, is petitioner.</p> <p>Please see petition for details.</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 of the Notice of Hearing on:                             <ol style="list-style-type: none"> <li>a. Chrystal Farily (guardian)</li> </ol> </li> </ol>
<b>Cont. from</b>		<p><b>Declaration of Guardian, Crystal Farily,</b>                  filed on 8/24/15</p>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
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<input type="checkbox"/>	<b>Notice of Hrg</b>	<input checked="" type="checkbox"/>	
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<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>		
			<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 8/21/15</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 4 – White/Rodriguez</b></p>

**First Account Current and Report of Conservator and Petition for Allowance of Compensation to Conservator and Attorney**

		<p><b>PUBLIC GUARDIAN, Conservator, is petitioner.</b></p> <p>Account period: 3/13/14 – 5/21/15</p> <table> <tr> <td>Accounting</td> <td>-</td> <td><b>\$410,619.79</b></td> </tr> <tr> <td>Beginning POH</td> <td>-</td> <td><b>\$386,187.26</b></td> </tr> <tr> <td>Ending POH</td> <td>-</td> <td><b>\$266,571.98</b></td> </tr> <tr> <td>Conservator</td> <td>-</td> <td><b>\$13,623.04</b></td> </tr> <tr> <td colspan="3">(100.24 Deputy hours @ \$96/hr and 52.49 Staff hours @ \$76/hr)</td> </tr> <tr> <td>Attorney</td> <td>-</td> <td><b>\$2,500.00</b> (per Local Rule)</td> </tr> <tr> <td>Bond fee</td> <td>-</td> <td><b>\$518.00</b> (o.k.)</td> </tr> <tr> <td>Court fees</td> <td>-</td> <td><b>\$537.00</b> (filing fee, certified copies)</td> </tr> </table> <p><b>Petitioner prays for an Order:</b></p> <ol style="list-style-type: none"> <li>1. Approving, allowing and settling the first account;</li> <li>2. Authorizing the conservator and attorney fees and commissions;</li> <li>3. Payment of the bond fee.</li> </ol>	Accounting	-	<b>\$410,619.79</b>	Beginning POH	-	<b>\$386,187.26</b>	Ending POH	-	<b>\$266,571.98</b>	Conservator	-	<b>\$13,623.04</b>	(100.24 Deputy hours @ \$96/hr and 52.49 Staff hours @ \$76/hr)			Attorney	-	<b>\$2,500.00</b> (per Local Rule)	Bond fee	-	<b>\$518.00</b> (o.k.)	Court fees	-	<b>\$537.00</b> (filing fee, certified copies)	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
Accounting	-		<b>\$410,619.79</b>																								
Beginning POH	-		<b>\$386,187.26</b>																								
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Court fees	-		<b>\$537.00</b> (filing fee, certified copies)																								
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		<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 8/21/15</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 5A – Nishioka</b></p>																									



**Atty Ramirez, Mina L. (for Joseph Patrick De Los Reyes – Conservator/Petitioner)**

**Amended Petition Terminating Conservatorship, Discharging Conservators,**

**Approving First and Final Account, Distribution of Assets, Waiver of Attorney Fees, Waiver of Conservator Fees and Discharge of Bond**

<b>DOD: 05/29/14</b>	<b>JOSEPH PATRICK DE LOS REYES,</b> son/Conservator of the Person and Estate, is Petitioner. Bond of \$30,000.00 was filed 04/07/14.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>See page 25 for related Petition for Probate</b>
	Account period: <b>04/07/14 – 05/30/14</b>	<b>CONTINUED FROM 07/22/15</b>
<b>Cont. from 042915, 052715, 070115, 072215</b>	Accounting: <b>\$206,338.03</b> Beginning POH: <b>\$201,076.17</b> Ending POH: <b>\$199,129.38</b> (\$9,129.38 is cash)	1. Petitioner states that conservatee's bank closed conservatee's account and paid out the remaining funds to the pay-on-death beneficiaries designated by the conservatee upon the conservatee's death. The Court may require more information about this and/or reimbursement to the conservatorship estate of amounts distributed without court order.
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		2. Petitioner requests authority to sell the real property asset of the conservatorship estate, which is currently in foreclosure. The Conservatee died on 05/29/14, consequently, the Conservatorship terminated by operation of law on 05/29/14. The Court retains jurisdiction for the purpose of settling the final account of conservator pursuant to Probate Code § 2630. However, since the conservatorship has terminated due to conservatee's death, it appears that the sale of real property should occur in a subsequent probate proceeding after the final account of Conservator has settled and assets distributed to the Administrator of the Estate. The Court may require authority for selling a real property asset of a conservator after the death of a conservatee.
<input checked="" type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>	Subsequent Account period: <b>06/01/14 – 07/15/14</b>	
<input type="checkbox"/> <b>PTC</b>	Accounting: <b>\$209,893.68</b> Beginning POH: <b>\$199,129.38</b> Ending POH: <b>\$200,043.19</b>	
<input type="checkbox"/> <b>Not.Cred.</b>	Conservator: <b>waived</b>	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Attorney: <b>waived</b>	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> w/	Petitioner requests that the property on hand consisting of real property, a vehicle, various tools, and miscellaneous furniture and furnishings be distributed to the estate of Wilfred Layvas De Los Reyes. A Probate proceeding for the administration of the estate will be filed with this Court upon the approval of this final account.	
<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>		
<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>	<b>Petitioner prays for an Order that:</b>	
<input checked="" type="checkbox"/> <b>2620(c)</b>	1. The conservatorship of the Person and Estate terminated by operation of law on 05/29/14, conservatee's date of death;	
<input checked="" type="checkbox"/> <b>Order</b>	2. The Conservator and surety bond be discharged;	
	3. The Amended First and Final Account of Conservator be approved;	
	4. The assets on hand be distributed to the Estate of Wilfred Layvas De Los Reyes;	
	5. And for other such relief as the Court deems proper and just.	
<input type="checkbox"/> <b>Aff. Posting</b>		<b>Note:</b> It is unclear whether petitioner is still requesting authority to sell the real property as a Petition for Probate has been filed (See page 25). This Petition has been amended a number of times to correct various issues. A new amended petition that takes all corrections into account and re-states the accounting and relief requested may be helpful.
<input type="checkbox"/> <b>Status Rpt</b>		<b>Reviewed by:</b> JF
<input type="checkbox"/> <b>UCCJEA</b>		<b>Reviewed on:</b> 08/24/15
<input type="checkbox"/> <b>Citation</b>		<b>Updates:</b>
<input type="checkbox"/> <b>FTB Notice</b>		<b>Recommendation:</b>
	Continued on Page 2	<b>File 8 – De Los Reyes</b>

**Declaration of Joseph Patrick De Los Reyes Regarding Attorney Fees and Closure of Conservatee's Bank Account** filed 05/20/15 states:

- 1) He paid, from conservatee's funds, a total of \$956.38 to the Law Office of Mina L. Ramirez and agrees to reimburse the conservatorship estate this amount.
- 2) When Merced School Employees Federal Credit Union was notified of conservatee's death, the credit union automatically closed his bank account and issued checks to the named beneficiaries, as "pay-on-death" payees. Petitioner and his sister were the named beneficiaries.
- 3) Presently, the estate's real property is in foreclosure and is scheduled for a public sale in July 2015. The property appraised for \$175,000.00. There is approximately \$167,000.00 owed on the first mortgage, and \$17,000.00 on the line of equity that the conservatee owes. Petitioner seeks the court's authority to sell the house for either the appraised value or as a short sale.

Probate Status Hearing RE: Receipt for Blocked Account

	<b>DEBORAH TITUS</b> , Conservator, petitioned the court for an Order Confirming Sale of Real Property.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		1. <b>Need receipt for blocked account or current written status report</b> 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.
<b>Cont. from</b>	The Order Confirming Sale of Real Property was signed on 7/29/15. The proceeds from the sale were ordered placed into a blocked account.	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	Minute Order dated 7/29/15 set this status hearing for receipt for blocked account.	
<b>Aff.Mail</b>		
<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>Reviewed by: KT</b>
<b>Status Rpt</b>		<b>Reviewed on: 8/24/15</b>
<b>UCCJEA</b>		<b>Updates:</b>
<b>Citation</b>		<b>Recommendation:</b>
<b>FTB Notice</b>		<b>File 9 – Dolby</b>

**First and Final Report of Status of Administration on Account and Petition  
for (1) Compensation to Attorney for Ordinary and Extraordinary Services  
(2) Compensation to Administrator for Ordinary Services (3)  
Reimbursement of Costs and (4) Final Distribution**

<b>DOD: 4/15/14</b>		<b>JOSEPH W. HAYES, JR.</b> , Administrator, is petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need property tax certificate.</li> <li>2. Both the attorney and the administrator are requesting to be reimbursed for the costs of the initial \$435.00 filing fee.</li> <li>3. Proposed distribution does not distribute the 2013 Honda Dirt Bike and the furniture and furnishings. – Examiner has interlined the order.</li> </ol>
		Account period: 4/16/14 – 7/9/15	
<b>Cont. from</b>		Accounting - <b>\$308,168.12</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Beginning POH - <b>\$293,696.92</b>	
<input checked="" type="checkbox"/>	<b>Verified</b>	Ending POH - <b>\$ 56,293.93</b>	
<input checked="" type="checkbox"/>	<b>Inventory</b>	Attorney (statutory) - <b>\$8,895.99</b>	
<input type="checkbox"/>	<b>PTC</b>		
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>	Attorney x/o - <b>\$3,106.00</b> (for sale of real property. 2 hrs. of paralegal time at \$110/hr., 10.20 attorney hours @ \$275-285/hr.)	
<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>	Attorney costs - <b>\$734.00</b> (filing fee, certified copies, probate referee)	
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>	Administrator (statutory) - <b>\$8,895.99</b>	
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>	10/17/14 Administrator costs - <b>\$10,619.43</b> (for upkeep on the real property prior to sale.)	
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>	Holographic Will states, "I Joseph W. Hayes III want my son Garrett to go to my parents Joseph Hayes Jr and Shirly Hayes. Also my assets that I have house, truck, bank accounts and retirement from Caltrans."	
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>	Petitioner proposes that distribution should be to Petitioner, Joseph W. Hayes, Jr. and Shirly Hayes.	
<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>Proposed distribution is to:</b> Joseph W. Hayes, Jr. - <b>\$9,771.26</b> Shirly Hayes - <b>\$9,776.26</b>	
			<b>Reviewed by:</b> 8/24/15
			<b>Reviewed on:</b> KT
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 10 - Hayes</b>

<b>DOD: 9/5/13</b>	<p><b>CHRISTINA NONINI PERICAS and MARTIN A. NONINI</b> were appointed Co-Administrators with Will Annexed with Full IAEA without bond on 12/9/14.</p> <p>At the hearing on 12/9/14, the Court set this status hearing for the filing of the Inventory and Appraisal.</p> <p><b>Status Report filed 5/19/15 states</b> an Inventory and Appraisal has been submitted to the Probate Referee for appraisal. There are two items included: One is an undivided interest in real property in San Luis Obispo County that needs to be appraised by the Probate Referee in that county. The other is two units in a limited partnership that was discovered while reviewing the decedent's final personal income tax returns. Information concerning the limited partnership interest is necessary to complete the I&amp;A and was only recently provided by the limited partnership. It is anticipated that it can be filed within the next 30 days. Attorney Simonian will attend the status hearing and can address additional questions at that time.</p> <p><b>Status Report filed 6/23/15 states</b> additional information concerning the nature of the limited partnership interest was necessary for the Probate Referee to complete the I&amp;A and has now been obtained and provided to the Probate Referee. It is anticipated that the I&amp;A will be filed within 2-3 weeks.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 5/20/15, 6/24/15, 7/22/15.</b></p> <p><b>As of 8/21/15, nothing further has been filed.</b></p> <p><b>1. Need Inventory and Appraisal pursuant to Probate Code §8800 or current written status report pursuant to Local Rule 7.5.</b></p>
<b>Cont. from 052015, 062415, 072215</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
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<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> 8/21/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 11 - Nonini</b></p>	

**Petition for Final Distribution on Waiver of Accounting and for Allowance of Statutory Compensation to Attorneys**

<b>DOD: 7/28/14</b>		<p><b>KAREN AZEVEDO</b>, Administrator, is petitioner.</p> <p>Account in waived.</p> <p>I &amp; A - <b>\$536,250.00</b>                  POH - <b>\$536,250.00</b></p> <p>Administrator - <b>waives</b></p> <p>Attorney (less than statutory) - <b>\$12,000.00</b></p> <p>Costs - <b>\$497.74</b>                  (\$110.66 has been paid leaving a balance of \$387.08)</p> <p>Closing - <b>\$2,000.00</b></p> <p><b>Distribution, pursuant to Intestate succession, is to:</b></p> <p>Karen Azevedo, surviving spouse, 100% of the community property consisting of:</p> <ul style="list-style-type: none"> <li>• 2014 Diamond C Utility Trailer</li> <li>• 2002 Yamaha Off Road AT Quad</li> <li>• 1964 Horse Trailer</li> <li>• 1988 Chevrolet Flat Bed Truck</li> <li>• Real property located in Laton</li> </ul> <p>Karen Azevedo, surviving spouse, 1/3 of the decedent's separate property consisting of 50% interest in real property located in Fresno County.</p> <p>Nicholas Azevedo, Joshua Azevedo and Tyson Azevedo, each, an undivided 1/3 interest in 2/3 of decedent's 50% interest in real property located in Fresno County.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need itemization of costs.</p> <p>2. Petition does not allege any facts for the court to determine that the property passing to the surviving spouse is community property.</p> <p>3. Petition does not contain a statement indicated notice to the Franchise Tax Board was performed, as required by Probate Code 9202(c)(1).</p>
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input checked="" type="checkbox"/>	<b>PTC</b>		
<input checked="" type="checkbox"/>	<b>Not.Cred.</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>		
<input checked="" type="checkbox"/>	<b>Letters</b> 12/11/14		
<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 checked="" type="checkbox"/>	<b>9202</b> X		
<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>		
		<p><b>Reviewed by:</b> KT</p> <p><b>Reviewed on:</b> 8/24/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 12 – Azevedo</b></p>	

Probate Status Hearing Re: Filing of the Inventory and Appraisal

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><b>OFF CALENDAR.</b> Inventory and Appraisal filed on 8/18/15.</p>
Cont. from		
	Aff.Sub.Wit.	
	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	
		Reviewed by: KT
		Reviewed on: 8/24/15
		Updates:
		Recommendation:
		File 14 – Beatty

<b>DOD: 12/28/14</b>	<b>DEBORAH A. HARPER</b> , Spouse, was appointed Administrator with Full IAEA with bond of \$185,000.00 on 5/13/15.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Minute Order 6/24/15:</u> Ms. Peck reports that her client did not qualify for bond and requests a reduction to limited authority and an order that the proceeds go into a blocked account. The Court revokes its previous orders and the issued Letters subject to reissuing on 7/29/15.</p> <p><u>Minute Order 7/29/15:</u> Ms. Harper is directed to contact Ms. Peck by phone today.</p> <p><u>As of 8/21/15, nothing further has been filed. The following issues remain noted:</u></p> <ol style="list-style-type: none"> <li>1. Notice of Hearing was served <u>without</u> a copy of the declaration filed 7/8/15. Rather, a copy of the original petition was attached. Need clarification of whether notice of this request to waive bond was properly served.</li> <li>2. The petition originally indicated \$10,000.00 in personal property with \$100.00 annual income and real property valued at \$174,000.00; therefore bond was fixed at \$185,000.00.</li> </ol> <p>While amending to limited authority may alleviate the need for bond regarding the real property, bond may still be necessary for the personal property, the nature of which is unknown.</p> <p>The Court may require waivers of bond (DE-142) from the decedent's three adult children, or may require clarification regarding the nature of the personal property, and if cash, may require blocking.</p> <p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 8/21/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 15 - Harper</b></p>
	At the hearing on 5/13/15, the Court set this status hearing for the filing of bond.	
<b>Cont. From: 062415, 072915</b>	Letters have not yet issued.	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	<b>Declaration of Deborah Harper filed 7/8/15 states</b> after submitting her bond application, she was informed that she did not qualify due to her credit, and was asked if anyone would co-sign the bond application with her. A co-signer was found, but due to the co-signer's credit, she still did not qualify for bond.	
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>	Ms. Harper therefore requests the Court modify the order appointing her as administrator by:	
<b>Objections</b>	<ol style="list-style-type: none"> <li>i. Reducing her authority from Full to Limited authority; or</li> <li>ii. Granting full authority and requiring that any estate cash or sale proceeds be deposited into a blocked account.</li> </ol>	
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>	With the above-listed adjustments to the order, she is confident that she can efficiently, timely and responsibly administer this relatively modest estate to the Court's satisfaction.	
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

<b>DOD: 05/29/14</b>	<b>JOSEPH DE LOS REYES</b> , son, is Petitioner and requests appointment as Administrator without bond.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Confidential Supplement to Duties and Liabilities of Personal Representative (form DE-147S).
	Full IAEA – OK	
<b>Cont. from</b>	All heirs waive bond	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Decedent died intestate	
<input checked="" type="checkbox"/> <b>Verified</b>	Residence: Fresno	
<input type="checkbox"/> <b>Inventory</b>	Publication: The Fresno Bee	
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	<b>Estimated Value of the Estate:</b>	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> w/	Personal property - \$15,000.00	
<input checked="" type="checkbox"/> <b>Aff.Pub.</b>	Real property - <9,000.00>	
<input type="checkbox"/> <b>Sp.Ntc.</b>	<b>Total - \$6,000.00</b>	
<input type="checkbox"/> <b>Pers.Serv.</b>	Probate Referee: <b>RICK SMITH</b>	
<input type="checkbox"/> <b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b> x		
<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> JF
		<b>Reviewed on:</b> 08/24/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 25 – De Los Reyes</b>



**29 Alveon LaJuan Moultrie (GUARD/E) Case No. 14CEPR00956**

Guardian Moultrie, Alvin (Pro Per – Father – Guardian of the Estate)

Probate Status Hearing Status RE: Filing of the Inventory and Appraisal.

	ALVIN MOULTRIE, Father, was appointed Guardian of the Estate without bond on 3/24/15.	NEEDS/PROBLEMS/COMMENTS:  <b>Note:</b> On 8/24/15, Mr. Moultrie filed the Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked Account, which shows that the minors' funds are held in blocked accounts. Therefore, the status hearing regarding the filing of that receipt has been taken off calendar, but this status hearing re filing of the I&A remains.  <b>Note:</b> On 8/24/15, Mr. Moultrie also filed a Petition for Withdrawal of Funds from Blocked Account that is set for hearing on 10/6/15.  1. Need Inventory and Appraisal per Probate Code §2610 or written status report per Local Rule 7.5.
	At the hearing on 3/24/15, the Court set this status hearing for the filing of the Inventory and Appraisal.	
Cont. from 072115, 072915, 081915		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
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Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 8/21/15
		Updates: 8/24/15
		Recommendation:
		File 29B – Moultrie

	ALVIN MOULTRIE, Father, was appointed Guardian of the Estate without bond on 3/24/15.	NEEDS/PROBLEMS/COMMENTS:  <b>Note:</b> On 8/24/15, Mr. Moultrie filed the Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked Account, which shows that the minors' funds are held in blocked accounts. Therefore, the status hearing regarding the filing of that receipt has been taken off calendar, but this status hearing re filing of the I&A remains.  <b>Note:</b> On 8/24/15, Mr. Moultrie also filed a Petition for Withdrawal of Funds from Blocked Account that is set for hearing on 10/6/15.  2. Need Inventory and Appraisal per Probate Code §2610 or written status report per Local Rule 7.5.
	At the hearing on 3/24/15, the Court set this status hearing for the filing of the Inventory and Appraisal.	
<b>Cont from 072115, 072915, 081915</b>		
Aff.Sub.Wit.		
Verified		
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Notice of Hrg		
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Aff.Pub.		
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Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
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Video Receipt		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 8/21/15
		Updates:
		Recommendation:
		File 30B - Moultrie

**1A Cailyn Sky Mendoza (GUARD)**

**Case No. 08CEPR00223**

Attorney Margoian, Michael J. (for Petitioners James Willhoit and Georgette Willhoit)  
 Attorney Hopper, Cindy J. (for Samantha Willhoit, mother)  
 Petitioner Mendoza, Angel (Pro Per Petitioner, paternal grandfather)  
 Petitioner Garcia, Rebecca (Pro Per Petitioner, paternal grandmother)

**Petition to Modify Existing Visitation Order**

		<p><b>JAMES WILLHOIT and GEORGETTE WILLHOIT</b>, maternal grandparents and Co-Guardians, are Petitioners.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>This matter will be heard in Department 72 at 8:30 a.m.</b></p>
		<p>Petitioners seek an order suspending the existing orders for visitation between the minor and her birth mother and father and paternal grandparents, and modifying the terms and conditions of the Order filed 10/23/2008 as it relates to visitation.</p>	<p><u>Page 1B</u> is the <i>Petition for Visitation, Notice of Motion, etc.</i>, filed by Samantha Willhoit, mother.</p> <p><u>Page 1C</u> is the <i>Petition for Modifying Existing Orders for More Visitation, etc.</i>, filed by Rebecca Garcia, paternal grandmother, and Angel Mendoza, paternal grandfather.</p>
<p><b>Cont. from 081315</b></p>			
	Aff.Sub.Wit.		<p><i>~Please see Petition for details~</i></p> <p><i>~Please see additional page~</i></p>
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W /	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W /	
	Conf. Screen		
	Letters		
	Duties/Supp		
✓	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			<p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 8/21/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 1A – Mendoza</b></p>

*Declaration in Opposition* filed by REBECCA GARCIA and ANGEL MENDOZA, paternal grandparents, on 8/12/2015.

*Samantha Willhoit's Response and Objections to Petitioner's Request to Modify Existing Visitation Order* filed on 8/12/2015.

*Petition for Opposition [i.e. Objection to] Permanent Guardianship and Modifying Existing Order for More Visitations Unsupervised* filed by JAMES MENDOZA, father, on 8/21/2015.

Attorney Margojian, Michael J. (for Petitioners James Willhoit and Georgette Willhoit)  
 Attorney Hopper, Cindy J. (for Samantha Willhoit, mother)  
 Petitioner Mendoza, Angel (Pro Per Petitioner, paternal grandfather)  
 Petitioner Garcia, Rebecca (Pro Per Petitioner, paternal grandmother)

**Petition for Visitation; Notice of Motion; Supporting Declaration in Support of Petition for Visitation**

		<p><b>SAMANTHA WILLHOIT</b>, mother, is Petitioner.</p> <p>Petitioner seeks a formal order for visitation with the minor.</p> <p style="text-align: center;">~Please see <i>Petition for details</i>~</p> <p><b>Notice of Motion for Modification of Child Visitation</b> was filed 8/13/2015; <b>Declaration of Samantha Willhoit in Support of Notice of Motion for Child Visitation</b> was filed 8/13/2015; these documents reiterate the statements in the <b>Petition for Visitation</b> filed 8/13/2015 by Samantha Willhoit.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note: This matter will be heard in Department 72 at 8:30 a.m.</b></p> <p>1. Per <i>Minute Order</i> dated 8/13/2015, need proof of service of notice of the <i>Petition for Visitation</i>; and <i>Notice of Motion</i>; etc. to Rebecca Garcia, paternal grandmother, and James Mendoza, father, by overnight delivery.</p> <p><b>Note:</b> <i>Proof of Service by Facsimile</i> filed 8/17/2015 shows the instant <i>Petition for Visitation</i>; and <i>Notice of Motion</i>; etc. was served by facsimile to Attorney Michael Margosian, to Rebecca Garcia, paternal grandmother, and to James Mendoza, father, on 8/13/2015. Per <i>Minute Order</i> dated 8/13/2015, only Attorney Margosian agreed to accept service by fax.</p>																																												
<p>Cont. from</p> <table border="1"> <tr> <td>Aff.Sub.Wit.</td> <td></td> </tr> <tr> <td>✓ Verified</td> <td></td> </tr> <tr> <td>Inventory</td> <td></td> </tr> <tr> <td>PTC</td> <td></td> </tr> <tr> <td>Not.Cred.</td> <td></td> </tr> <tr> <td>Notice of Hrg</td> <td></td> </tr> <tr> <td>✓ Aff. FAX</td> <td></td> </tr> <tr> <td>Aff.Overnight</td> <td>X</td> </tr> <tr> <td>Sp.Ntc.</td> <td></td> </tr> <tr> <td>Pers.Serv.</td> <td></td> </tr> <tr> <td>Conf. Screen</td> <td></td> </tr> <tr> <td>Letters</td> <td></td> </tr> <tr> <td>Duties/Supp</td> <td></td> </tr> <tr> <td>Objections</td> <td></td> </tr> <tr> <td>Video Receipt</td> <td></td> </tr> <tr> <td>CI Report</td> <td></td> </tr> <tr> <td>9202</td> <td></td> </tr> <tr> <td>Order</td> <td>X</td> </tr> <tr> <td>Aff. Posting</td> <td></td> </tr> <tr> <td>Status Rpt</td> <td></td> </tr> <tr> <td>UCCJEA</td> <td></td> </tr> <tr> <td>Citation</td> <td></td> </tr> <tr> <td>FTB Notice</td> <td></td> </tr> </table>				Aff.Sub.Wit.		✓ Verified		Inventory		PTC		Not.Cred.		Notice of Hrg		✓ Aff. FAX		Aff.Overnight	X	Sp.Ntc.		Pers.Serv.		Conf. Screen		Letters		Duties/Supp		Objections		Video Receipt		CI Report		9202		Order	X	Aff. Posting		Status Rpt		UCCJEA		Citation	
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		<p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 8/21/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 1B – Mendoza</b></p>																																													

Attorney Margoian, Michael J. (for Petitioners James Willhoit and Georgette Willhoit)  
 Attorney Hopper, Cindy J. (for Samantha Willhoit, mother)  
 Petitioner Mendoza, Angel (Pro Per Petitioner, paternal grandfather)  
 Petitioner Garcia, Rebecca (Pro Per Petitioner, paternal grandmother)

**Petition to Modify Existing Visitation Orders for More Visitation; and  
 Opposing Permanent Guardianship; Supporting Declaration**

		REBECCA GARCIA, paternal grandmother, and ANGEL MENDOZA, paternal grandfather, are Petitioners.  ~Please see Petition for details~	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note: This matter will be heard in Department 72 at 8:30 a.m.</b>  1. <i>Petition</i> is signed but not verified by Petitioners pursuant to Probate Code § 1021 and CA Rule of Court 7.103. (Note: This issue is raised based on a procedural defect; however, it does not require amendment of the Petition.)
Cont. from			
Aff.Sub.Wit.			
Verified	X		
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
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Conf. Screen			
Letters			
Duties/Supp			
Objections			
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CI Report			
9202			
Order	X		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: LEG	
		Reviewed on: 8/21/15	
		Updates:	
		Recommendation:	
		File 1C - Mendoza	