

1 Kelli Michelle Godinez (Estate)

Case No. 07CEPR01353

Attorney Kruthers, Heather H. (for Public Administrator – Petitioner)

First and Final Account and report of Successor Administrator and Petition for Allowance of Ordinary Commissions and Fees and for Distribution

DOD: 08/27/2007	PUBLIC ADMINISTRATOR , Successor Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 03/26/2015 – 07/17/2015	
Cont. from	Accounting - \$135,475.48	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$135,475.48	
<input checked="" type="checkbox"/> Verified	Ending POH - \$35,475.48 (cash)	
<input checked="" type="checkbox"/> Inventory	Executor - \$5,064.27 (Statutory)	
<input type="checkbox"/> PTC		
<input checked="" type="checkbox"/> Not.Cred.	Attorney - \$5,064.27 (Statutory)	
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	Costs - \$25.50 (Certified copy of Letters)	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.	Bond - \$84.66	
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	Distribution, pursuant to intestate succession, is to:	
<input checked="" type="checkbox"/> Letters 04/09/15	Maximilano Godinez, Sr. – cash in the amount of \$8,217.26	
<input type="checkbox"/> Duties/Supp	Jason Smith – cash in the amount of \$8,217.26	
<input type="checkbox"/> Objections	Wilfred J. Godinez – cash in the amount of \$8,217.26	
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input checked="" type="checkbox"/> FTB Notice		
		Reviewed by: LV
		Reviewed on: 08/25/2015
		Updates:
		Recommendation: SUBMITTED
		File 1 – Godinez

2 Brian L Fulcher (Estate) Case No. 11CEPR00144

Attorney Kruthers, Heather H (for Public Administrator – Petitioner)

First and Final Account and Report of Successor Administrator and Petition for Allowance of Ordinary and Extraordinary Commissions and Fees of Insolvent Estate

DOD: 02/20/2011	PUBLIC ADMINISTRATOR , Successor Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:	
	Account period: 02/20/2011 – 06/29/2015		
Cont. from	Accounting - \$233,035.00		
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$230,535.00		
<input checked="" type="checkbox"/> Verified	Ending POH - \$2,642.30		
<input checked="" type="checkbox"/> Inventory	Administrator (Statutory) - \$7,360.70		
<input type="checkbox"/> PTC			
<input checked="" type="checkbox"/> Not.Cred.	Attorney (Statutory) - \$7,360.70		
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail w/	X/O - \$1,000.00 (per Local Rule for sale of real property)		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.	Costs - \$25.50 (certified copy of letters)		
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen	Petition states after only partial payment of commissions, fees, and costs, there will be no estate from which to pay creditors or make distribution to the heirs.		
<input checked="" type="checkbox"/> Letters 08/16/13			
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input checked="" type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input checked="" type="checkbox"/> FTB Notice			
			Reviewed by: LV
			Reviewed on: 08/25/2015
		Updates:	
		Recommendation: SUBMITTED	
		File 2 – Fulcher	

3 Leticia Wilson (GUARD/P) Case No. 12CEPR00762

Petitioner Palacios, Shannalee (Pro Per – Mother)

Petition for Visitation

Age: 5 years	SHANNALEE PALACIOS, mother, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 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 Visitation for: <ul style="list-style-type: none"> • Katie Cipolla (Guardian) • Father (Unknown) Note: Per minute order of 01/17/2013 regarding the General Guardianship petition the Court dispensed with further notice to the father unless and until his identity becomes known.
Cont. from		
Aff.Sub.Wit.		
✓ Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	x	
Aff.Mail	x	
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: 08/26/2015
		Updates:
		Recommendation:
		File 3 – Wilson

	<p>CATHERINE A. AMADOR, Petitioner, is the attorney for Michele Torres and Nadine Walker since 10/23/14 in presenting objections regarding a prior petition for appointment of conservatorship of their mother by their brother, Stanley Greenberg, and in filing a competing petition.</p>	<p>NEEDS/PROBLEMS /COMMENTS:</p>
<p>Cont from 062515, 072315</p>	<p>The Public Guardian was appointed as Conservator of the Person and Estate on 12/10/14.</p>	<p>Minute Order 7/23/15: This matter is continued for the Court to ask questions of Mr. Helon with regard to his involvement and any information he has to assist the Court in determining whether or not the competing petition was filed in the best interest of the Conservatee (\$2640.1).</p>
<p><input type="checkbox"/> Aff.Sub.Wit.</p>	<p>Petitioner requests fees in connection with her representation of Ms. Torres and Ms. Walker and in reaching agreement on the matter.</p>	<p>Note: Additional documentation has been filed since the last hearing. See Page 2 for details.</p>
<p><input checked="" type="checkbox"/> Verified</p>	<p>Petitioner asks that she be paid \$5,596.00, which includes \$5,125.00 for 20.50 attorney hours @ \$250/hr and costs of \$471.00.</p>	<p>Reviewed by: skc</p>
<p><input type="checkbox"/> Inventory</p>	<p>Service are itemized by date and include appearance at hearings, working with Mr. Helon and Mr. Bagdasarian to resolve questions concerning the conservatorship estate and management of trust assets, etc.</p>	<p>Reviewed on: 8/25/15</p>
<p><input type="checkbox"/> PTC</p>	<p>An Objection was filed 6/24/15 by Stanley Greenberg, former temporary conservator. Objector states that after four long mediations, the proper setting and care for the Conservatee was agreed upon pursuant to the agreement dated 10/16/13. This agreement also provided for Stanley Greenberg to be appointed permanent conservator of the person. Consequently, the only reason for the Objections filed by Ms. Amador and the legal fees incurred on behalf of Nadine Walker and Michele Torres was to pry into the finances of the trust under the guise of requesting to become conservators of the person and estate. In order to stop the endless lengthy communications, unfounded allegations, and unreasonable requests, Stanley Greenberg agreed to the appointment of the Public Guardian as Conservator of the Person and Estate. No wrongdoing was ever determined against Stanley P. Greenberg's handling of the assets or through his trust administration. Ms. Walker and Ms. Torres' petitions were simply a fishing expedition for information they were not entitled to receive, but was provided during mediations, and about which they simply would not stop making unreasonable requests. Probate Code §2640 allows a conservator of the estate to petition for compensation. Her client was not appointed as conservator, and the petition does not direct any specific party to pay said compensation. Objector refers to communication between the PG and Ms. Amador and requests that no compensation be approved to be paid by the estate of Conservatee for services rendered by Ms. Amador to Ms. Walker and Ms. Torres.</p>	<p>Updates:</p>
<p><input type="checkbox"/> Not.Cred.</p>	<p>SEE ADDITIONAL PAGES</p>	<p>Recommendation</p>
<p><input checked="" type="checkbox"/> Notice of Hrg</p>		<p>File 4 - Greenberg</p>
<p><input checked="" type="checkbox"/> Aff.Mail w</p>		
<p><input type="checkbox"/> Aff.Pub.</p>		
<p><input type="checkbox"/> Sp.Ntc.</p>		
<p><input type="checkbox"/> Pers.Serv.</p>		
<p><input type="checkbox"/> Conf. Screen</p>		
<p><input type="checkbox"/> Letters</p>		
<p><input type="checkbox"/> Duties/Supp</p>		
<p><input checked="" type="checkbox"/> Objections</p>		
<p><input type="checkbox"/> Video Receipt</p>		
<p><input type="checkbox"/> CI Report</p>		
<p><input type="checkbox"/> 9202</p>		
<p><input checked="" type="checkbox"/> Order</p>		
<p><input type="checkbox"/> Aff. Posting</p>		
<p><input type="checkbox"/> Status Rpt</p>		
<p><input type="checkbox"/> UCCJEA</p>		
<p><input type="checkbox"/> Citation</p>		
<p><input type="checkbox"/> FTB Notice</p>		

Page 2

Petitioner Catherine Amador filed Reply to Objection on 6/30/15. Petitioner states he petition for fees and costs is authorized under §2640.1 and should be granted. Her clients' actions have allowed the Conservatee to remain in her daughter's home where she is happy and well cared-for, and ensured that she will continue to do so unless or until Ms. Walker is unable to properly care for her at home. Moreover, it is no longer necessary for Ms. Walker to beg Mr. Greenberg for adequate funds, and a sensible budget has been developed by the PG. Their actions have benefitted the Conservatee and there has also been a reduction of strife and conflict among the family.

Petitioner states she has now incurred an additional three hours reviewing the file and preparing this reply, plus attendance at a second hearing. Therefore, fees are now increased from \$5,125 to \$6,250. See Reply for additional description of details/history.

Response filed 7/17/15 by Mr. Greenberg responds to the various details provided in the Reply and requests that no compensation be approved to Petitioner for services rendered to Ms. Walker and Ms. Torres.

On 8/18/15, Ms. Amador filed two declarations in support of the petition. Declaration of Catherine A. Amador states she has reviewed the docket and pleadings filed prior to her appearance in this proceeding, along with correspondence provided by her clients and the mediation order from October 2013. Based on that review, she can state with confidence that there was no Petition requesting appointment of a conservator of the estate on file with the court prior to the petition she prepared on behalf of her clients. The Court's appointing a conservator of the estate was a direct result of the petition that she prepared and filed.

Declaration of Michele Torres provide extensive detail regarding their mother's condition and states it was not until she and Nadine brought the competing petition that the Court was advised of Stan's refusal to use the Conservatee's own assets to fully provide for her needs and to ensure that Stan would not be able to move the Conservatee out of Nadine's home without cause. It was their petition that resulted in the appointment of a conservator of the estate, as Stan's petition had only sought appointment of a conservator of the person. See declaration for additional details.

On 8/27/15, Stanley Greenberg filed a declaration in support of his objection to the petition. Mr. Greenberg states Michele Torres' behavior has cost the conservatee's trust an enormous amount of funds. The balance needs to be retained for the conservatee's care. See declaration for details and responses to specific issues raised including placement of the Conservatee. All issues were discussed at length in mediation and Ms. Torres and Ms. Walker's petition was imply a fishing expedition for information they were not entitled to receive, but which had been provided during mediation, and about which they simply would not stop making unreasonable requests.

Objector requests no compensation be approved to be paid by the estate for services rendered by Catherine A. Amador to Michelle Torres and Nadine Walker.

First and Final Account and Report of Status of Administration of Administrator, Petition for Approval of Mutual Compromise and Settlement Agreement Regarding Distribution of the Estate and for Settlement thereof; for Allowance of Statutory Attorney's Fees; for Extraordinary Attorney's Fees' for Reimbursement of Costs Advanced and for Final Distribution

DOD: 05/12/13	ROSANNA TOROSIAN , Administrator, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> The Petition indicates that estate property will pass to citizens of Italy. The Petition does not address and the Notice of Hearing does not reflect that Notice was provided to a recognized diplomatic or consular official of Italy maintaining an office in the United States as required pursuant to Probate Code § 8113. Notice of Hearing filed 07/21/15 indicates that the attorney representing several of the heirs was mailed notice, however, pursuant to CA Rule of Court 7.51 (a)(1) notice must be mailed individually and directly to the person entitled to notice in addition to the attorney (Probate Code § 1214). Therefore, need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> for: Antonio Simone, Elisa Simone, Vittoria Simone, Giuseppe Simone, Giuseppina Simone, Sebastiano Simone, Angela Simone, Cinzia Simone, Francesco Sicoli, Sebastiano Sicoli, Maria Pia Sicoli, Angela Sicoli, Gianni Sicoli, Emilio Sicoli
	Account period: 05/12/13 – 07/15/15	
	Accounting: \$462,010.12	
	Beginning POH: \$439,443.82	
	Ending POH: \$421,062.95	
Cont. from	Administrator: \$12,014.00 (statutory)	
<input type="checkbox"/> Aff.Sub.Wit.	Administrator costs: \$355.14 (for costs related to maintenance or real property, decedent's dog, and filing fees)	
<input checked="" type="checkbox"/> Verified	Administrator creditor's claim: \$17,900.40 (pursuant to Settlement Agreement between Administrator and the heirs)	
<input checked="" type="checkbox"/> Inventory	Attorney: \$12,014.00 (statutory) (\$9,611.00 to Gary Bagdasarian and \$2,403.00 to John Garland, Executor of the Estate of Joanne Sanoian)	
<input checked="" type="checkbox"/> PTC	Costs: \$435.00 (filing fees)	
<input checked="" type="checkbox"/> Not.Cred.	Attorney X/O: \$1,000.00 (per Local Rule for the sale of real property – to Joanne Sanoian)	
<input checked="" type="checkbox"/> Notice of Hrg	Closing: \$2,730.83	
<input checked="" type="checkbox"/> Aff.Mail w/	On 11/26/13, Administrator filed a Creditor's Claim against the estate in the amount of \$59,668.00 for compensation for 10 years of service to decedent handling and assisting in many tasks related to running of the household and transportation. On 02/19/14, the heirs of the estate filed an objection to the Creditor's Claim. The parties reached an agreement as reflected in the Mutual Compromise and Settlement Regarding Distribution of the Estate dated 10/10/14. Petitioner requests that the Court approve the Settlement Agreement (attached to Petition as Exhibit "A").	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters 08/14/13		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
<input checked="" type="checkbox"/> FTB Notice		

Continued on Page 2

Distribution, pursuant to intestate succession, is to:

Rose Torosian	-	\$43,283.98
Antonio Simone	-	\$47,332.80
Elisa Simone	-	\$47,332.80
Vittoria Simone	-	\$47,332.80
Giuseppe Simone	-	\$47,332.80
Giuseppina Simone	-	\$47,332.80
Sebastiano Simone	-	\$15,777.60
Angela Simone	-	\$15,777.60
Cinzia Simone	-	\$15,777.60
Francesco Sicoli	-	\$7,888.80
Sebastiano Sicoli	-	\$7,888.80
Maria Pia Sicoli	-	\$7,888.80
Angela Sicoli	-	\$7,888.80
Gianni Sicoli	-	\$7,888.80
Emilio Sicoli	-	\$7,888.80

DOD: 2/21/13		<p>CARL JOHN PETERSON, Executor with Full IAEA without bond, is Petitioner.</p> <p>Accounting is waived.</p> <p>I&A: \$704,585.00 POH: Not stated</p> <p>Executor (Statutory): \$17,081.70</p> <p>Executor (Extraordinary): \$930.00 (for 31 hours @ \$30/hr in connection with the special administration, will contest, sale of real property, as itemized on Exhibit J)</p> <p>Executor: \$3,049.00 (Reimbursement for expenses paid from personal account as itemized on Exhibit H, including \$1,300.00 to Attorney Boyajian, \$33.00 parking ticket while in court, gardener, photo lab, utilities, postage)</p> <p>Attorney (Statutory): \$17,081.70</p> <p>Attorney (Extraordinary): \$32,500.00 (for 130 hours @ \$250/hour in connection with the special administration, will contest, sale of real property, as itemized on Exhibit I)</p> <p>Juanita Sobania: \$3,727.80 (Reimbursement for payment of Decedent's obligations owed at her death, as itemized on Exhibit G)</p> <p>Reserve: \$500.00 (for accountant fee)</p> <p>Distribution pursuant to Decedent's will:</p> <p>Tambra Peterson: Proceeds from the sale of the residence in the amount of \$256,000.00, plus \$10,000.00 specific devise, plus vehicle, contents of residence</p> <p>Matthew Peterson: \$10,000.00</p> <p>Florinda Torres: \$5,000.00</p> <p>John Torres: \$5,000.00</p> <p>Cynthia Ann Wallert: \$10,000.00 plus \$2,800.00 for services rendered to the decedent prior to her death per attached contract.</p> <p>Balance as follows: One-half (\$70,500.85) to Tambra Peterson and one-half (\$70,500.85) to John Torres and Florinda Torres.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>SEE PAGE 2</u></p>
Aff.Sub.Wit.			
✓	Verified		
✓	Inventory		
✓	PTC		
✓	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail w/o		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
✓	Letters 7/11/14		
Duties/Supp			
Objections			
Video Receipt			
CI Report			
✓	9202		
✓	Order		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
✓	FTB Notice		

Reviewed by: skc

Reviewed on:
8/26/15

Updates:

Recommendation:

File 6 – Gomes

Page 2

NEEDS/PROBLEMS/COMMENTS:

1. Attorney Boyajian did not sign the petition itself and also did not sign his request for extraordinary compensation.
2. Order on Stipulation for Settlement of Will Contest included payment to Contestant Kimbra Pannett in the sum of \$75,000.00. Petitioner states at Page 10 that this amount was paid; however, no receipt has been filed. Need receipt from Ms. Pannett for this payment.
3. The petition does not state the assets on hand pursuant to Probate Code §10954 and Cal. Rule of Court 7.550(b)(4). Therefore, Examiner is unable to confirm the proposed distribution.
4. The provisions of the lost will provide that Tambra Peterson is to receive a specific cash gift of \$20,000.00 in addition to the residence and personal property; however, Petitioner's prayer and order indicate \$10,000.00. Need clarification or corrected order.
5. Petitioner requests reimbursement for \$1,300.00 paid to Attorney Boyajian. Need clarification, as this payment appears to be a violation of Probate Code §10830 et seq., and Cal. Rule of Court 7.700 (no compensation in advance of court order). If this amount was used for costs of administration, need itemization.
6. Petitioner proposes to pay Cynthia Ann Wallert \$2,800.00 based on a contract to clean Decedent's house, in addition to her specific devise of \$10,000.00. The contract attached as Exhibit F to this petition is a handwritten note dated 6/26/12 that states: "To whom it may concern, I Natalie Gomes pay Cynthia AF Wallert \$100.00 per week for domestic services." The Court may require further clarification or itemization regarding the proposed payment of \$2,800.00, since no Creditor's Claim was filed in the estate by Ms. Wallert.
7. The Court may require clarification as to why the decedent's sister, Juanita Sobania, was paying the estate's expenses in connection with the real property instead of the Executor. (See request for reimbursement of \$3,727.80.)
8. The proposed order is not in compliance with Local Rule 7.6.1.F. Some portion of the order must appear on the page upon which the judge's signature is affixed.

DOD: 02/07/14	ANTHONY ALCAZAR was appointed as Administrator with Full IAEA with bond of \$150,000.00 on 4-8-14.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 052915	Bond was filed and Letters issued on 5-1-14.	<u>CONTINUED FROM 05/29/15</u>
Aff.Sub.Wit.		
Verified	At the hearing on 04/08/14, the Court set this status hearing for the filing of the First and Final Account and Petition for Distribution.	1. Need First & Final Account or Petition on Waiver of Account and for Distribution.
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Inventory & Appraisal, Final, filed 10/14/14 - \$240,000.00	
Aff.Mail	Additional bond of \$90,000.00 filed 05/29/15.	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Second Status Report Regarding Filing of the First Account and/or Petition for Final Distribution filed 08/20/15 states: seven creditors' claims have been filed against the estate. One such claim filed on behalf of USA Bank Trust, N.A., in the amount of \$241,630.12 is purportedly secured by 2347 N. Wapoma, of which the estate has a 50% interest. The remaining 50% interest is in the name of a guardianship for the decedent's son, Adell Anderson, Jr., who turned 18 in May 2015. When investigating the guardianship matter, it was found that the Inventory & Appraisal filed in the guardianship lists a 100% interest in the Wapoma property. The estate and USA Bank Trust are currently in negotiations regarding how to best resolve the claim against the estate. The claim has not yet been resolved and is complicated by the need to address the Guardianship's interest in the property and any settlement must be approved by the Court in both this estate case and in the guardianship case, the estate is not yet in a position to be closed. Additionally, USA Bank's counsel has requested an extension of time to proceed with settlement negotiations as he is set to begin an unrelated trial at the end of August. Accordingly, in order to permit the estate an opportunity to further investigate the guardianship's interest in the property a six month continuance is requested.	
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 08/25/15
		Updates:
		Recommendation:
		File 7 - Anderson

8 George W. Satterberg, Jr Special Needs Trust (SNT) Case No. 14CEPR00393

Attorney

Boyett, Deborah K.

Probate Status Hearing Filing of the First Account

Age:		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u> First Account filed 07/24/15 and set for hearing on 09/02/15</p>
DOD:		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 08/26/15
		Updates:
		Recommendation:
		File 8 – Satterberg

Attorney Tomassian, Gerald M. (for Karen Lynn Blue – Successor Administrator – Petitioner)

Attorney Marshall, Ryan D. (for Margaret Valenzuela – Objector)

Waiver of Accounting and Petition for Allowance of Compensation to Attorney, for Final Distribution

DOD: 5/8/14	KAREN LYNN BLUE , Successor Administrator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: Continued from 8/12/15. See Reply to Objection, Page 2.
	Accounting is waived.	
	I&A: \$1,706,074.10	
	POH: \$60,674.10 plus real property in Fresno, limited partnership shares, two vehicles.	
Cont. from 081215		
<input type="checkbox"/> Aff.Sub.Wit.	Administrator (Statutory): Both Former Administrator and Successor Administrator waived compensation	
<input checked="" type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory	Attorney (Statutory): \$30,060.74	
<input checked="" type="checkbox"/> PTC	Distribution pursuant to intestate succession and disclaimers:	
<input checked="" type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Karen Lynn Blue – Entire estate	
<input checked="" type="checkbox"/> Aff.Mail		
Aff.Pub.	Objection filed 8/10/15 by Margaret Valenzuela states attached is a copy of a Probate Purchase Agreement and Joint Escrow Instructions dated 3/4/15 wherein Karen, as seller, in an unspecified capacity, and Margaret, as buyer, agreed to the purchase and sale of the real property on the terms set forth in the agreement. Based upon the attached Extension of Time Addendum, the seller was to obtain "probate court approval" on or before 6/9/15 and escrow was to close on or before 6/30/15. Despite Margaret advising Karen that she is prepared to close escrow and that her loan approval is in place, Karen has refused to move forward with closing escrow by providing a clear pest report and roof certification. Instead, Karen filed this petition, and no petition is on file in the proceeding to approve the sale. Furthermore, Margaret is informed and believes that Karen has re-listed the property at a price \$20,000 more than the sale price specified in their agreement. Based on the foregoing, Objector objects to the final distribution of the real property to which Karen is in contravention to and bypasses the existing Probate Purchase Agreement wherein Karen agreed to sell the real property to Margaret during estate administration.	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
<input checked="" type="checkbox"/> Letters		
Duties/Supp		
<input checked="" type="checkbox"/> Objections		
Video Receipt		
CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting Status Rpt		
UCCJEA		
Citation		
<input checked="" type="checkbox"/> FTB Notice	Objector requests the Court deny the petition and direct Petitioner to conclude the sale to Objector or to make any distribution to Karen subject to the specific performance and completion by Karen under the Probate Purchase Agreement.	
		Reviewed by: skc
		Reviewed on: 8/25/15
		Updates:
		Recommendation:
		File 9 – Blue

Page 2

Response to Objection filed 8/11/15 states Objector has no standing, should be denied. Authority cited indicates that a claimant of property or contract rights adverse to the estate cannot have that claim resolved in the probate court. Karen Blue signed real estate forms individually, not as personal representative of the estate, and has not signed any forms since becoming successor administrator.

Reply to Response filed 8/19/15 states Petitioner argues in her Response to Objection that she did not sign the Probate Purchase Agreement in her capacity as Administrator and therefore Objector has no claim against the estate and no standing to object to the petition. These arguments lack merit and Objector offers this reply.

Objector seeks to clarify precisely what action she is seeking from the Court:

First, Objector requests that the Court either deny the petition or refrain from ruling on the Petition pending the filing of a Complaint by Objector in the probate action for specific performance related to the real property.

Second, the Probate Purchase Agreement stands on its own without regard to the Seller's capacity. Objector reasonably believed that Petitioner was acting in a fiduciary capacity on behalf of the estate with apparent authority since she was the sole beneficiary and used a Probate Purchase agreement for. Additionally, Objector had been made aware by Petitioner that the property was yet undistributed from the estate because the Probate Purchase Agreement required Court approval prior to closure of escrow. Therefore, whether she was or was not administrator at the time of execution is trivial with respect to determination of whether Objector is an interested party, as Petitioner clearly held herself out as having authority and acted with apparent authority to enter into the Probate Purchase Agreement.

Petitioner also contends that Objector lacks standing and is a "stranger" to the estate. Objector is clearly not a stranger to the estate. As discussed above, Objector has acquired an enforceable interest in the estate consisting of the right to acquire the real property held in the estate.

See Reply for authority. In light of the above, as well as the facts and arguments raised in Objector's underlying objection, Objector respectfully asks that the Court either deny the Petition or refrain from ruling pending the filing of a complaint in the probate action for specific performance related to the real property.

Examiner's Note: If a complaint is filed, it may not be appropriate to file in this Probate action, since the remedy(ies) sought may not be solely pursuant to Probate Code. Rather it appears it would be more appropriately filed as a separate civil action.

Status Hearing re: Filing of the Inventory and Appraisal

DOD: 4/14/15	DENNIS RODRIGUEZ and MAXINE RODRIGUEZ , were appointed co-conservators of the estate without bond on 3/17/15.	NEEDS/PROBLEMS/COMMENTS:
	Minute Order dated 3/17/15 set this status hearing for the filing of the inventory and appraisal.	<p>Continued from 7/22/15. Minute order states Mr. Krbechek represents that the Conservatee died before any action was taken on the conservatorship estate. Mr. Bagdasarian filed a Probate petition this morning which has been set for hearing on 8/27/15; this matter is trailed to meet up with the estate matter. (Please see page 22 for the Probate Estate matter.)</p> <ol style="list-style-type: none"> 1. Need inventory and appraisal 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. 2. There is an outstanding balance owing in this case of \$480.00 for the court investigation on the request for appointment of a temporary conservator.
Cont. from 072215		
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: 8/25/15
		Updates:
		Recommendation:
		File 10 – Rodriguez

First and Final Report of Executor; Petition for Final Distribution Without an Accounting and for Allowance of Compensation for Ordinary Services

DOD: 1/3/15	BRANDON K. TAMURA , Executor, is petitioner.	NEEDS/PROBLEMS/COMMENTS:	
	Accounting is waived.		
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.	I & A - \$178,024.40		
<input checked="" type="checkbox"/> Verified	POH - \$178,370.37		
<input checked="" type="checkbox"/> Inventory	Executor - waives		
<input checked="" type="checkbox"/> PTC	Attorney (statutory) - \$6,346.73		
<input checked="" type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg W/	Distribution, pursuant to Decedent's Will, is to:		
<input checked="" type="checkbox"/> Aff.Mail	Brandon K. Tamura and Kristine Ishimara as Co-Trustees of the Tamura Family Living Trust - \$172,023.64		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters 3/10/15			
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input checked="" type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input checked="" type="checkbox"/> FTB Notice			
			Reviewed by: KT
			Reviewed on: 8/27/15
		Updates:	
		Recommendation: SUBMITTED	
		File 11 – Tamura	

Probate Status Hearing RE: Filing of the Inventory and Appraisal

	DILILA EULULIA AGANZA , mother, was appointed guardian of the estate on 4/23/15.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Inventory and appraisal or current written status report.</p>
	Minute order dated 4/23/15 stated the order was to be signed ex parte.	
Cont. from		
Aff.Sub.Wit.		
Verified	The order appointing guardian was signed on 8/17/15 and ordered all funds into a blocked account.	
Inventory		
PTC		
Not.Cred.	Letters issued on 8/20/15.	
Notice of Hrg	Minute order dated 7/23/15 for receipt for blocked account indicated that there were no appearances. The court issued an Order to Show Cause as to why Ms. Aganza should not be removed for failure to file the blocking order and receipt. The OSC hearing is set for 9/3/15.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp	Blocking order signed 8/17/15 ordering \$11,907.11 into a blocked account.	
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 8/26/15
		Updates:
		Recommendation:
		File 12 – Gonzalez

Jose Ibarra, III

Petitioner Ibarra, Felipe De Jesus (Pro Per – Petitioner – Paternal Uncle)

Petition for Appointment of Guardianship of the Person

Jose Age: 8	<p align="center"><u>NO TEMPORARY REQUESTED</u></p> <p>FELIPE DE JESUS IBARRA, paternal cousin, is petitioner.</p> <p align="center"><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Petition pertains to Daniel Ibarra and Jose Ibarra only. Christina Rose Gomez was appointed Guardian of Michael Ibarra on 07/22/2015.</p> <ol style="list-style-type: none"> UCCJEA is incomplete. Need minor's residence information for the past 5 years. Page #5 of the Guardianship Petition – Child Information Attachment (GC 210(CA)) which pertains to whether the child has Native American Ancestry was not completed. Need declaration with page #5 attached. 	
Daniel Age: 4			
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg			n/a
<input type="checkbox"/> Aff.Mail			n/a
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			n/a
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input checked="" type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input checked="" type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
<p>Reviewed by: LV</p>			
<p>Reviewed on: 08/26/2015</p>			
<p>Updates:</p>			
<p>Recommendation:</p>			
<p>File 13 – Ibarra</p>			

14 Robert and June Gregory Living Trust 2006, Dated 8/11/2006

Case No. 15CEPR00491

Attorney Anderson, Leighton M., of Whittier, for Petitioner Robert S. Gregory, Jr.

Petition for Order Confirming Successor Trustee and Trust Assets (PC 17200, 17200.1)

Robert Sr. DOD: 11/20/2009	ROBERT S. GREGORY, JR. , Successor Trustee, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:		
June DOD: 6/8/2013				
Cont. from 062315, 072815	Petitioner states:	Continued from		
<table border="1"> <tr> <td data-bbox="110 556 305 594">Aff.Sub.Wit.</td> <td data-bbox="305 556 378 594"></td> </tr> </table>	Aff.Sub.Wit.		<ul style="list-style-type: none"> Petitioner is the Successor Trustee of the ROBERT AND JUNE GREGORY LIVING TRUST 2006 (copy attached as Exhibit A); 	7/28/2015 per request of counsel. All defects raised for the last hearing have been addressed.
Aff.Sub.Wit.				
<table border="1"> <tr> <td data-bbox="110 594 305 632">✓ Verified</td> <td data-bbox="305 594 378 632"></td> </tr> </table>	✓ Verified		<ul style="list-style-type: none"> At the time of the creation of the Trust, both Trustors validly executed wills containing pour-over provisions directing that the Trust become the owner of assets not formally transferred to the Trust (copies of wills attached as Exhibit B); 	1. Petition lists the APN for both parcels with the Book number 057 , while the Supplement to Petition for Order Confirming Successor Trustee and Trust Assets filed 7/30/2015 shows one of the parcels with the Book number 058 , creating a discrepancy as to correct parcel description. Exhibit 2 Assessors Map shows Book 057 . Need clarification. (Note: Proposed order also lists one parcel as Book 057 and one as 058.)
✓ Verified				
<table border="1"> <tr> <td data-bbox="110 632 305 669">Inventory</td> <td data-bbox="305 632 378 669"></td> </tr> </table>	Inventory		<ul style="list-style-type: none"> During his lifetime, Robert S. Gregory, Sr. inherited real property in Laton, CA, pursuant to the Order Approving and Settling First and Final Report of Executor, etc., ("Order") filed on 1/28/1994 and entered in probate proceeding of the Estate of Louise Gregory (Case 484802-4; copy of Order attached as Exhibit D); 	
Inventory				
<table border="1"> <tr> <td data-bbox="110 669 305 707">PTC</td> <td data-bbox="305 669 378 707"></td> </tr> </table>	PTC		<ul style="list-style-type: none"> The Order (beginning on page 8) confirmed the distribution of the real property subject of this petition to Robert S. Gregory, Sr., one of the Trustors; the Order was recorded on 1/28/1994; 	
PTC				
<table border="1"> <tr> <td data-bbox="110 707 305 745">Not.Cred.</td> <td data-bbox="305 707 378 745"></td> </tr> </table>	Not.Cred.		<ul style="list-style-type: none"> After entry of the Order, Robert S. Gregory transferred title to real property conveyed to him pursuant to the Order to himself and to his spouse, June D. Gregory, as joint tenants; 	
Not.Cred.				
<table border="1"> <tr> <td data-bbox="110 745 305 783">✓ Notice of Hrg</td> <td data-bbox="305 745 378 783"></td> </tr> </table>	✓ Notice of Hrg		<ul style="list-style-type: none"> In 2006, Robert and June created the Trust and executed pour-over Wills; on 8/11/2006, the jointly executed a Quitclaim Deed transferring title to their jointly held property to their family trust (copy of deed attached as Exhibit E); 	
✓ Notice of Hrg				
<table border="1"> <tr> <td data-bbox="110 783 305 821">✓ Aff.Mail</td> <td data-bbox="305 783 378 821">W/</td> </tr> </table>	✓ Aff.Mail	W/	<ul style="list-style-type: none"> Despite these facts, neither the Quitclaim Deed nor the earlier Deed by which separate property of Robert S. Gregory, Sr., was transferred to him and to June D. Gregory, as joint tenants, included any explicit reference to two parcels, 057-280-18S and 057-280-16, conveyed to Robert S. Gregory by the Order as recorded on 1/28/1994; 	
✓ Aff.Mail	W/			
<table border="1"> <tr> <td data-bbox="110 821 305 858">Aff.Pub.</td> <td data-bbox="305 821 378 858"></td> </tr> </table>	Aff.Pub.		<ul style="list-style-type: none"> Both of these parcels were conveyed to Robert S. Gregory Sr., on the date of the Order [1994], even though neither of the parcels is expressly referenced by parcel number in the Order; 	
Aff.Pub.				
<table border="1"> <tr> <td data-bbox="110 858 305 896">Sp.Ntc.</td> <td data-bbox="305 858 378 896"></td> </tr> </table>	Sp.Ntc.		<p align="center">~Please see additional page~</p>	
Sp.Ntc.				
<table border="1"> <tr> <td data-bbox="110 896 305 934">Pers.Serv.</td> <td data-bbox="305 896 378 934"></td> </tr> </table>	Pers.Serv.		<p align="center">~Please see additional page~</p>	
Pers.Serv.				
<table border="1"> <tr> <td data-bbox="110 934 305 972">Conf. Screen</td> <td data-bbox="305 934 378 972"></td> </tr> </table>	Conf. Screen			
Conf. Screen				
<table border="1"> <tr> <td data-bbox="110 972 305 1010">Letters</td> <td data-bbox="305 972 378 1010"></td> </tr> </table>	Letters			
Letters				
<table border="1"> <tr> <td data-bbox="110 1010 305 1047">Duties/Supp</td> <td data-bbox="305 1010 378 1047"></td> </tr> </table>	Duties/Supp			
Duties/Supp				
<table border="1"> <tr> <td data-bbox="110 1047 305 1085">Objections</td> <td data-bbox="305 1047 378 1085"></td> </tr> </table>	Objections			
Objections				
<table border="1"> <tr> <td data-bbox="110 1085 305 1123">Video Receipt</td> <td data-bbox="305 1085 378 1123"></td> </tr> </table>	Video Receipt			
Video Receipt				
<table border="1"> <tr> <td data-bbox="110 1123 305 1161">CI Report</td> <td data-bbox="305 1123 378 1161"></td> </tr> </table>	CI Report			
CI Report				
<table border="1"> <tr> <td data-bbox="110 1161 305 1199">9202</td> <td data-bbox="305 1161 378 1199"></td> </tr> </table>	9202			
9202				
<table border="1"> <tr> <td data-bbox="110 1199 305 1236">✓ Order</td> <td data-bbox="305 1199 378 1236"></td> </tr> </table>	✓ Order			
✓ Order				
<table border="1"> <tr> <td data-bbox="110 1236 305 1274">Aff. Posting</td> <td data-bbox="305 1236 378 1274"></td> </tr> </table>	Aff. Posting			
Aff. Posting				
<table border="1"> <tr> <td data-bbox="110 1274 305 1312">Status Rpt</td> <td data-bbox="305 1274 378 1312"></td> </tr> </table>	Status Rpt			
Status Rpt				
<table border="1"> <tr> <td data-bbox="110 1312 305 1350">UCCJEA</td> <td data-bbox="305 1312 378 1350"></td> </tr> </table>	UCCJEA			
UCCJEA				
<table border="1"> <tr> <td data-bbox="110 1350 305 1388">Citation</td> <td data-bbox="305 1350 378 1388"></td> </tr> </table>	Citation			
Citation				
<table border="1"> <tr> <td data-bbox="110 1388 305 1425">FTB Notice</td> <td data-bbox="305 1388 378 1425"></td> </tr> </table>	FTB Notice			
FTB Notice				

Petitioner states, continued:

- Robert S. Gregory, Sr., is the legal owner of the two parcels, 057-280-18S and 057-280-16, and is vested with record title in said parcels from and after January 28, 1994, the date of recordation of the Order;
- This Petition is necessary to confirm title to said parcels in the Trust, in order that said parcels may be held, managed, administered and distributed according to the provisions of the Trust;
- The parcels are part of farm land held and farmed at all material times by members of the Gregory family, including Robert S. Gregory, Sr., deceased, and his eldest son, Petitioner Robert S. Gregory, Jr.;
- It was always the intention of Trustors, Robert S. Gregory, Sr., and June D. Gregory to place all parcels of land owned by them or either of them relating to the farm in the name of their Trust.

Supplement to Petition for Order Confirming Successor Trustee and Trust Assets filed 7/30/2015 states:

- At the time the Petition was filed, Petitioner and his counsel did not have a copy of the *Schedule A* of the Trust and believed that no such *Schedule A* could be found;
- After the question was raised in the Examiner Notes, Petitioner's counsel renewed their request to the attorney who prepared the Trust to search records, and in response *Schedule A* was found and provided and is attached as Exhibit 1;
- *Schedule A* refers explicitly to the real property [057-280-18S and 057-280-16S], which is the subject of the instant *Heggstad Petition*; *Exhibit 2* attached is the Assessor's parcel map for reference regarding the APN showing both parcels 16 and 18S ("S" signifying the land is used as a road), with both parcels on County records as Book 57, page 28;
- Based on extensive communications with the Mapping Department of the County Assessor, the two parcels are described as APN 057-280-16, 4.83 acres in Laton [*legal description omitted*] and APN 058-280-18S, 9.5 acres in Laton [*legal description omitted*];
- As set forth in the Petition, the two parcels were never transferred to the Trust by Robert S. Gregory, Sr., when the Trust was created, which may have been the result of technical confusion that arose at the time the parcels were created by the 1/28/1994 Order in the Louise Gregory Probate Proceeding (Case 484802-4) as referenced in the *Petition*.

Petitioner prays for an Order that:

1. The Robert and June Gregory Living Trust 2006 dated 8/11/2006 is valid;
2. Robert S. Gregory, Jr., is confirmed as Successor Trustee of the Trust; and
3. That parcels numbers 057-280-18S and 057-280-16 be deemed as assets of the Trust and are subject to the management and control of Petitioner Robert S. Gregory, Jr., as successor Trustee of the Trust, and should be distributed and administered pursuant to the terms of the Trust.

NEEDS/PROBLEMS/COMMENTS, continued:

2. Proposed order has proof of service documents attached, which violates Local Rule 7.6.1(E), and thus should be removed. Additionally, proposed order makes the statement in finding paragraph 6 that the pending *Petition* is granted to the extent stated above and in all other respects denied, which appears to violate Local Rule 7.6.1(D) providing that orders shall be drawn so that their effect may be determined without reference to the petition on which they are based; thus, the finding in paragraph 6 should be stricken. Need revised proposed order.

Petitioner Ramirez, Rogelio (pro per – father)
 Petitioner Ramirez, Maria Anita (pro per – mother)

Amended Petition for Appointment of Probate Conservator

Age: 36	<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS:
	ROGELIO RAMIREZ and MARIA ANITA RAMIREZ , parents, are Petitioners and request appointment as Co-Conservators of the Person with Medical Consent powers.	Petitioners are Spanish speaking.
	Declaration of Dr. David Cardona supports request for medical consent powers.	Voting rights affected, need minute order.
Cont. from	Voting rights affected	Court Investigator advised rights on 07/15/15.
<input type="checkbox"/> Aff.Sub.Wit.	Petitioner states [see Petition for details]/	
<input checked="" type="checkbox"/> Verified	Court Investigator Samantha Henson filed a report on 07/16/15.	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail w/		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv. w/		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input checked="" type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input checked="" type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 08/26/15
		Updates:
		Recommendation:
		File 15 – Ramirez

16 Dylan Matney (GUARD/P)

Case No. 15CEPR00633

Petitioner: Carol Jean Steinhauer (pro per)

Petitioner: Don Mannon (pro per)

Petition to Appoint Guardian of the Person

		<p>THERE IS NO TEMPORARY. No temporary was requested.</p> <p>CAROL STEINHAUER and DON MANNON, non-relatives, are petitioners.</p> <p>Please see petition for details.</p> <p>DSS Social Worker Report filed 8/12/15</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service of the Notice of Hearing along with a copy of the petition or Consent and Waiver of Notice or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. Jamie Summer Matney (mother) b. Father 3. Need proof of personal service of the Notice of Hearing along with a copy of the petition or Consent and Waiver of Notice or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. Paternal grandparents b. Maternal grandparents 																																																																			
<p>Cont. from</p> <table border="1"> <tr> <td><input type="checkbox"/></td> <td>Aff.Sub.Wit.</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Verified</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Inventory</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>PTC</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Not.Cred.</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Notice of Hrg</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Aff.Mail</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Aff.Pub.</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Sp.Ntc.</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Pers.Serv.</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Conf. Screen</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Letters</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Duties/Supp</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Objections</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Video Receipt</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>CI Report</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>9202</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Order</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Aff. Posting</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Status Rpt</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>UCCJEA</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Citation</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>FTB Notice</td> <td></td> </tr> </table>				<input type="checkbox"/>	Aff.Sub.Wit.		<input checked="" type="checkbox"/>	Verified		<input type="checkbox"/>	Inventory		<input type="checkbox"/>	PTC		<input type="checkbox"/>	Not.Cred.		<input type="checkbox"/>	Notice of Hrg	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Aff.Mail	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Aff.Pub.		<input type="checkbox"/>	Sp.Ntc.		<input type="checkbox"/>	Pers.Serv.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Conf. Screen		<input checked="" type="checkbox"/>	Letters		<input checked="" type="checkbox"/>	Duties/Supp		<input type="checkbox"/>	Objections		<input type="checkbox"/>	Video Receipt		<input checked="" type="checkbox"/>	CI Report		<input type="checkbox"/>	9202		<input checked="" type="checkbox"/>	Order		<input type="checkbox"/>	Aff. Posting		<input type="checkbox"/>	Status Rpt		<input checked="" type="checkbox"/>	UCCJEA		<input type="checkbox"/>	Citation		<input type="checkbox"/>
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<input type="checkbox"/>	Citation																																																																					
<input type="checkbox"/>	FTB Notice																																																																					
		<p>Reviewed by: KT</p> <p>Reviewed on: 8/26/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 16 – Matney</p>																																																																				

Petition for Appointment of Probate Conservator

		TEMPORARY EXPIRES 8/27/15.	NEEDS/PROBLEMS/COMMENTS: 1. Need Citation. 2. Need proof of personal service of the Citation on Elvira Schembri. 3. Need Capacity Declaration.
		JUANITA JENNY CADENA , sister, is petitioner	
		Please see petition for details	
Cont. from		Court Investigator Report filed on 8/21/15	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input checked="" type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation	X	
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 8/26/15
			Updates:
			Recommendation:
			File 17 – Schembri

Petition to Determine Succession to Real Property

DOD: 5/6/15		JASON GALEMBA , son, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		40 days since DOD	
		No other proceedings.	
Cont. from		Decedent died intestate	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
I & A - \$110,000.00			
Petitioner requests court determination that Decedent's 100% interest in real property passes to him pursuant to intestate succession.			
Reviewed by: KT			
Reviewed on: 8/26/15			
Updates:			
Recommendation: SUBMITTED			
File 18 - Galemba			

Petition to Determine Succession to Real Property and Personal Property

DOD: 10/5/14		JOANNE KIMURA, daughter, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		40 days since DOD	
Cont. from		No other proceedings.	
	Aff.Sub.Wit.	Will dated 4/4/97 devises entire estate to Joanne Tollady (aka Joanne Kimura).	
✓	Verified	I & A - \$58,406.99	
	Inventory	Petitioner requests court determination that Decedent's 100% interest in real property and 65.242976 shares of Citigroup pass to her pursuant to Decedent's Will.	
	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		Reviewed by: KT
	Status Rpt		Reviewed on: 8/25/15
	UCCJEA		Updates:
	Citation		Recommendation: SUBMITTED
	FTB Notice		File 19 – Kimura

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under the Independent Administration of Estates Act

DOD: 03/10/15		MICHELLE R. BERNARD and ERIC C. HANSON, surviving spouse and friend/named Executors without bond, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:
Cont. from		Full IAEA – OK	<p>Note: Status hearings will be set as follows:</p> <ul style="list-style-type: none"> Thursday, January 28, 2016 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Thursday, October 27, 2016 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Will dated 02/26/15	
<input type="checkbox"/>	Inventory	Residence: Clovis	
<input type="checkbox"/>	PTC	Publication: The Business Journal	
<input type="checkbox"/>	Not.Cred.	Estimated Value of the Estate:	
<input checked="" type="checkbox"/>	Notice of Hrg	Personal property - \$300,005.00	
<input checked="" type="checkbox"/>	Aff.Mail	Probate Referee: RICK SMITH	
<input checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input 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 type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: JF
			Reviewed on: 08/26/15
			Updates:
			Recommendation: SUBMITTED
			File 20 – Ghazal

Petition to Determine Succession to Real Property (Prob. Code §13150)

DOD: 7/23/13		<p>SIMONE GOFF, Daughter, is Petitioner.</p> <p>40 days since DOD</p> <p>No other proceedings</p> <p>I&A: \$76,621.21 (real property located at 1134 E. Byrd Ave., Fresno, 93706, plus 171 shares of common stock of McDonald's Corporation)</p> <p>Petitioner requests Court determination that the decedent's 100% interest in the above assets pass to her pursuant to intestate succession.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
	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		
			<p>Reviewed by: skc</p> <p>Reviewed on: 8/26/15</p> <p>Updates:</p> <p>Recommendation: SUBMITTED</p> <p>File 21 – Hammond</p>

Petition for Letters of Administration; Authorization to Administer Under the Independent Administration of Estates Act

DOD: 4/14/15	MAXINE RODRIGUEZ , daughter, is petitioner and requests appointment as Administrator without bond.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need name and date of death of deceased spouse. Local Rule 7.1.1D.</p> <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Wednesday, January 27, 2016 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. • Wednesday, October 26, 2016 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>	
Cont. from	All heirs waive bond.		
<input type="checkbox"/> Aff.Sub.Wit.	Full IAEA – o.k.		
<input checked="" type="checkbox"/> Verified	Residence: Fresno		
<input type="checkbox"/> Inventory	Publication: Fresno Business Journal		
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail W/	Estimated value of the estate:		
<input checked="" type="checkbox"/> Aff.Pub.	Personal property - \$5,603.43		
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.	Probate Referee: Rick Smith		
<input type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed by: KT
			Reviewed on: 8/26/15
			Updates:
		Recommendation:	
		File 22 – Rodriguez	

Age: 1	<u>GENERAL HEARING: 10/15/15</u>	NEEDS/PROBLEMS/COMMENTS:
	TESSIEJARRA MACK , paternal grandmother, is Petitioner.	1. Need <i>Notice of Hearing</i> .
	Father: D'ANDRAE MARTIN, SR.	2. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person</i> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for:
Cont. from	Mother: TRACEY MCBETH	a. D'Andrae Martin, Sr. (father)
<input type="checkbox"/> Aff.Sub.Wit.	Paternal grandfather: SMILEY MARTIN	b. Tracey McBeth (mother)
<input checked="" type="checkbox"/> Verified	Maternal grandparents: UNKNOWN	
<input type="checkbox"/> Inventory	Petitioner states [see Petition for details].	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input 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		Reviewed by: JF
<input type="checkbox"/> Status Rpt		Reviewed on: 08/26/15
<input checked="" type="checkbox"/> UCCJEA		Updates:
<input type="checkbox"/> Citation		Recommendation:
<input type="checkbox"/> FTB Notice		File 23 – Martin

Attorney LeVan, Nancy (for Petitioners Cindy Nehring and Michael Cera)

Petition for Appointment of Temporary Conservator of the Estate

		<p><u>GENERAL HEARING SET FOR 9/28/2015</u></p> <p>CINDY NEHRING, daughter, and MICHAEL CERA, son, are Petitioners and request appointment as Co-Conservators of the Estate with bond.</p> <p align="center">~Please Petition for details~</p> <p>Court Investigator's Report was filed on 8/25/2015.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator Advised Rights on 8/24/2015.</p> <p>1. <i>Temporary Petition</i> is not signed or verified by Petitioner MICHAEL CERA, in violation of Probate Code § 1020 requiring the signature of all petitioners.</p> <p>2. Need <i>Conservatorship Video Viewing Certificate</i> pursuant to Local Rule 7.15.9(A) for Petitioner MICHAEL CERA.</p> <p>Note: Petitioners do not seek conservatorship of the person, though it is unclear the reason for this based upon the <i>CI Report</i> filed 8/25/2015 which appears to demonstrate that the proposed Conservatee is incapable of meeting her own needs for care, maintenance and support, and upon the fact that Petitioners filed a <i>Capacity Declaration</i> on 8/14/2015 which supports medical consents powers that would be granted to co-conservators of the person. Petitioners state their power of attorney for proposed Conservatee was revoked.</p>																																													
<p>Cont. from</p> <table border="1"> <tr> <td>Aff.Sub.Wit.</td> <td></td> </tr> <tr> <td>Verified</td> <td>X</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.Mail</td> <td>W/</td> </tr> <tr> <td>Aff.Pub.</td> <td></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></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	X	Inventory		PTC		Not.Cred.		✓ Notice of Hrg		✓ Aff.Mail	W/	Aff.Pub.		Sp.Ntc.		✓ Pers.Serv.		✓ Conf. Screen		✓ Letters		✓ Duties/Supp		Objections		✓ Video Receipt		CI Report		9202		✓ Order		Aff. Posting		Status Rpt		UCCJEA		✓ Citation		FTB Notice
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Sp.Ntc.																																																
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FTB Notice																																																

DOD: 11/27/05	ANITA CHOPERENA is Administrator with Limited IAEA.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need additional bond of \$550,000.00 or written status report pursuant to Local Rule 7.5. 2. The Court may require clarification regarding the time frame for closing the estate given the fact that the property has now been sold, and may set a status hearing for the filing of the petition for final distribution as appropriate.
	Current bond is \$106,000.00.	
	On 7/30/15, the Court confirmed the sale of real property for \$922,500.00 and set this status hearing re proof of additional bond in the amount of \$550,000.00.	
Aff.Sub.Wit.		
Verified		
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PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 8/26/15
		Updates:
		Recommendation:
		File 25 – Choperena

Petitioner Alvarez, Chantelle (Pro Per – Aunt – Petitioner)

Petition for Appointment of Temporary Guardian of the Person

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> Tennison Finney, Step-mother, was appointed Guardian on 7/1/15. Petitioner also filed a Petition for Termination of Ms. Finney’s Guardianship of the minors that is set for hearing on 10/19/15 along with her petition for general guardianship.</p> <p><u>Note:</u> Petitioner Resides in Union City, CA (Alameda County).</p> <p>1. Notice of Hearing filed 8/19/15 indicates service re the general hearing on 10/19/15 only. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) on: - Rick Finney (Father)</p>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			x
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			x
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 8/26/15	
			Updates:	
			Recommendation:	
			File 26 – Finney	