



## 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.







**First and Final Account and Report of Executor and Petition for Settlement Thereof; for Allowance of Compensation for Ordinary Services; for Reimbursement of Costs Advanced; and for Final Distribution**

<b>DOD: 8/5/15</b>		<b>BARBARA P. WORREL</b> , Executor with Full IAEA without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>Account period: 8/5/15 – 7/5/16</b>	<ol style="list-style-type: none"> <li>The I&amp;A filed 3/17/16 contains an asset titled "Prime Money Market Fund Account held at Vanguard," which was appraised by Executor. Probate Code §8901 allows the personal representative to appraise money and other cash items, including cash deposits and money market mutual funds as defined in §9730(b), including a brokerage <u>cash</u> account. All other mutual funds, stocks bonds, and other securities must be appraised by the Probate Referee.</li> </ol>
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Executor (Statutory): \$9,546.67	<ol style="list-style-type: none"> <li>It appears from the nature of this asset (income dividends were periodically received) that this asset should have been appraised by the Probate Referee. Therefore, need corrected I&amp;A.</li> </ol>
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>	Attorney (Statutory): \$9,546.67	<ol style="list-style-type: none"> <li>The attorney is requesting reimbursement from the estate for two CourtCall appearances totaling \$202; however, pursuant to Local Rule 7.17.B, the Court considers this a cost of doing business and not reimbursable.</li> </ol>
<input checked="" type="checkbox"/>	<b>PTC</b>		
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>	Costs: \$1,588.50 (filing, publication, certified letters, CourtCall appearances)	<ol style="list-style-type: none"> <li>Need revised proposed order in compliance with Local Rule 7.6.1.A, which requires monetary distributions to be stated in dollars, not as percentages of the estate.</li> </ol>
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	Closing: \$1,500.00	Reviewed by: skc Reviewed on: 8/24/16 Updates: Recommendation: File 12- Griffin
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>	Distribution pursuant to intestate succession:	
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>	Barbara P. Worrel: 50% Robert Craig Pople: 50%	
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		

Petition for Appointment of Probate Conservator of the Person

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:  Court Investigator advised rights on 2/22/16  Voting rights affected – need minute order  <u>Minute Order 8/3/16</u> : Examiner notes provided in open court. Petitioner will speak with the physician regarding the dementia medications.  <u>Note</u> : As of 8/24/16, nothing further has been filed. On 6/23/16, Petitioner filed an additional capacity declaration; however, it still does not contain the missing information. The following issue remains noted:  1. The Capacity Declaration does not address <u>dementia medication powers</u> ; only dementia placement. See Dementia Attachment GC-335A. Need clarification or revised capacity declaration.
Cont. from 030216, 041316, 042016, 051816, 062216, 080316			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
✓	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 8/24/16
			Updates:
			Recommendation:
			File 13- Rosales

Petition to Determine Succession to Real Property

<b>DOD: 3/7/16</b>		<p><b>MICHELLE DE LA CERDA, STACEY PIPES, RODGER WHITLEY, ROBERT WHITLEY, and NANCY DOWELL</b>, children and step-children, are Petitioners.</p> <p>40 days since DOD</p> <p>No other proceedings</p> <p>I&amp;A: \$115,000.00 (real property located at 2117 W. Dayton, Fresno, CA 93705)</p> <p>Will dated 1/21/14 devises the estate to decedent's children and step-children who survive him.</p> <p>Petitioners request Court determination that the real property passes to them pursuant to decedent's will in 20% interests each.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
<b>Cont. from 080316</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input 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 type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		<b>Reviewed by:</b> skc	
		<b>Reviewed on:</b> 8/24/16	
		<b>Updates:</b>	
		<b>Recommendation:</b> SUBMITTED	
		<b>File 15- McEver</b>	

