

<p>Chester Beeler DOD: 12/29/09</p>	<p>FRANCES BEELER ALBERS, Beneficiary, is Petitioner.</p>	<p>NEEDS/PROBLEMS/ COMMENTS:</p>
<p>Mary Lorene Beeler DOD: 4/2/10</p>	<p>Petitioner states the Chester & Lorene Beeler Trust was created 4/12/07. CHESTER PORTER BEELER and GAIL BROWN were designated as the initial co-trustees pursuant to the Third Amendment dated 7/3/08.</p>	<p>CONTINUED TO 10/8/15 Per Attorney request</p>
<p><input type="checkbox"/> Aff.Sub.Wit.</p>	<p>As a result of the resignation of Gail Brown, a vacancy has developed in the office of trustee. No provision was made in said trust for the appointment of a successor trustee.</p>	<p><u>SEE PAGE 2</u></p>
<p><input checked="" type="checkbox"/> Verified</p>	<p>The sole asset of the trust is an Installment Note (interest included) dated 8/27/07 in the face amount of \$171,000.00 executed by Bentotage Premaial Desilva and Damayanthi Desilva, which is secured by a Deed of Trust and Assignment of Rents recorded e9/7/07 in Fresno County Records as Document No. 2007-0167311. The unpaid balance as of 6/20/15 is \$158,381.87</p>	<p>Reviewed by: skc</p>
<p><input type="checkbox"/> Inventory</p>	<p>The Third Amendment to the Trust does not provide for the appointment of a successor trustee.</p>	<p>Reviewed on: 8/27/15</p>
<p><input type="checkbox"/> PTC</p>	<p>Petitioner as income beneficiary requests that the Court appoint MATT BICKEL, a licensed California fiduciary, as Successor Trustee (consent attached) with bond of \$160,000.00 due to the vacancy.</p>	<p>Updates:</p>
<p><input type="checkbox"/> Not.Cred.</p>	<p>Petitioner states the beneficiaries entitled to notice of this petition are Anna B. Hinley, Elizabeth Beeler Rogers, Gail Brown, Frances Albers, and West Park Baptist Church.</p>	<p>Recommendation:</p>
<p><input checked="" type="checkbox"/> Notice of Hrg</p>	<p>Petitioner requests that:</p> <ol style="list-style-type: none"> 1. The Court appoint Matt Bickel as Successor Trustee of the Chester & Lorene Beeler Living Trust dated 4/12/07; 2. The Court order that a bond of \$160,000.00 be obtained by the Successor Trustee with a receipt to be filed; and 3. The Court make all further and proper orders that the Court may deem necessary. 	<p>File 1 – Beeler</p>
<p><input checked="" type="checkbox"/> Aff.Mail w</p>	<p><u>SEE ADDITIONAL PAGES</u></p>	<p>1</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 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>		

Attorney Bagdasarian's declaration filed 8/26/15 states Gail Brown is the current trustee, and was formerly represented by Attorney Gregory Roberts. It is alleged that Gail Brown has failed to continue to administer the trust and was contacted through her counsel to resign as trustee. Mr. Roberts indicated that he would recommend same to Ms. Brown. However, on further contact with Mr. Roberts, he indicates that he has not been able to contact Ms. Brown to determine her willingness to resign and obtain the resignation on her behalf.

Mr. Bagdasarian indicates that it is imperative that a trustee be appointed to continue to administer the trust, including the collection of payments under a promissory note and the payment of fiduciary income taxes. Therefore, request is made that Matt Bickel be appointed as Successor Trustee with bond of \$160,000.00.

NEEDS/PROBLEMS/COMMENTS:

1. **Petitioner states the resignation of Gail Brown is attached as Exhibit C; however, no Exhibit C is attached. Mr. Bagdasarian's later declaration indicates that there may not be a signed resignation. Need clarification.**
2. **On 9/24/13, this Court granted Trustee Gail Brown's Petition for Settlement of her Second and Final Account and Report, which included final distribution of various trust assets, including the subject Installment Note as follows:**
 - To Elizabeth Beeler Rogers and John H. Beeler, 5.625% each or 11.25%
 - To Anna B. Hinley and Frances Beeler Albers (Petitioner), 18.0% each or 36.0%
 - To Fresno Rescue Mission 52.75%

This petition does not address that Order or allege whether any distribution occurred thereto, including distribution of the subject Installment Note or any of the other assets. Need clarification. Were the other assets distributed pursuant to the Order, leaving only this Installment Note as an asset of the trust? If so, why?

3. **Petitioner lists five parties entitled to notice as "income beneficiaries" at Paragraph 7, but does not include certain parties to whom shares of the subject Installment Note were *distributed* pursuant to the 9/24/13 order, namely, John H. Beeler and Fresno Rescue Mission.**

Further, this list should include each person entitled to notice of proceedings regarding the trust pursuant to Probate Code §17201, which based on the above details, may include more than just the five income beneficiaries of this particular trust asset.

Therefore, need complete list of persons entitled to notice of these proceedings. Continuance may be required for notice to those entitled thereto.

4. **Petitioner requests appointment of a successor trustee, but does not appear to request removal of the current trustee or provide grounds for removal pursuant to Probate Code §15642. Need clarification. At this point, there does not appear to be a vacancy, since no resignation has been filed. If granted, the Court may require a revised order including removal of Ms. Brown as trustee.**

		ANDREW HILL, father, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		DONAVAN MORRISON and PRISCILLA MORRISON, maternal grandparents, were appointed as Co-Guardians on 07/12/11. – Consent of both guardians filed 05/21/15.	<u>CONTINUED TO 10/8/15</u> Per Petitioner request
Cont. from 072115			<u>CONTINUED FROM 07/21/15</u> As of 08/28/15, nothing further has been filed and the following notes remain:
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		<ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Termination of Guardianship <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: <ol style="list-style-type: none"> a. Stephanie Morrison (mother) b. Paternal grandparents
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	x	
<input type="checkbox"/>	Aff.Mail	x	
<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 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		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: JF
			Reviewed on: 08/28/15
			Updates:
			Recommendation:
			File 2 – Morrison

Mother: **STEPHANIE MORRISON**

Paternal grandparents: NOT LISTED

Petitioner states that Jacob has been living with him full time since March 2013. The Guardians are in agreement that the guardianship be terminated.

Court Investigator Jennifer Young filed a report on 07/14/15.

CONTINUED TO 10/8/15
Per Petitioner request

CONTINUED FROM 07/21/15
As of 08/28/15, nothing further has been filed and the following notes remain:

1. Need Notice of Hearing.
2. Need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Termination of Guardianship or Consent & Waiver of Notice or Declaration of Due Diligence for:
 - a. Stephanie Morrison (mother)
 - b. Paternal grandparents

Reviewed by: JF

Reviewed on: 08/28/15

Updates:

Recommendation:

File 2 – Morrison

3 Edward Moore & Marie Moore Family Trust 11-12-91

Case No. 11CEPR00596

Attorney: Gregory J. Roberts (for Petitioner/Trustee Timothy Moore)

Second and Final Account and Report of Successor Trustee and Petition for Its Approval; for Allowance of Trustee's Fees and Reimbursement of Costs

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 080615			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: skc	
		Reviewed on: 8/31/15	
		Updates:	
		Recommendation:	
		File 3 – Moore	

Attorney Keene, Thomas J., of Dos Palos (for Petitioner David Brinkley)

Petition for Order to Continue to Operate Decedent's Business Under Probate Code Section 9760; and to Borrow Funds Under Probate Code Section 9760

DOD: 9/23/2010	<p>DAVID BRINKLEY, son and Administrator appointed on 8/30/2011 with Full IAEA Authority and without bond, is Petitioner.</p> <p>Petitioner states:</p> <ul style="list-style-type: none"> Under Probate Code § 9760, the personal representative of an estate may continue to operate the Decedent's business for more than 6 months following the death of the Decedent if the Court determines that it is to the advantage of the estate and in the best interest of the interested persons; Petitioner requests an order authorizing him to continue to operate Decedent's business of leasing the agricultural real property owned by the estate in return for annual payments from the Lessee; Lessee is the Petitioner, Administrator of the estate; Administrator has been operating the business with some success for over 31 years; The estate is not in a condition to be closed since the Inventory and Appraisal has not been filed and, once it is filed, this estate will file a spousal property petition to remove the name of the Decedent's late husband, SHERMAN BRINKLEY (DOD 2/18/2010) from the title to the real property; Once that petition is granted, it is anticipated that the estate will close rather quickly since all of the debts of the Decedent have been paid and the heirs have indicated that they will waive the accounting; <p style="text-align: center;">~Please see additional page~</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Status Hearings were not set in this case for the filing of the inventory and appraisal and the filing of the first account and/or petition for final distribution. Court will set a status hearing as follows:</p> <ul style="list-style-type: none"> Thursday, October 1, 2015 at 9:00 a.m. in Dept. 303 for the filing of the inventory and appraisal, and for the filing of the first account and/or petition for final distribution. <ol style="list-style-type: none"> Pursuant to Probate Code § 8800(b), <i>Final Inventory and Appraisal</i> was due 12/30/2011. Need <i>Final Inventory and Appraisal</i>. Pursuant to Probate Code § 12200, first account and/or petition for final distribution was due 8/30/2012. Need first account and/or petition for final distribution. <p>~Please see additional page~</p> <p>Reviewed by: LEG</p> <p>Reviewed on: 8/31/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 4 – Brinkley</p>
Cont. from		
Aff.Sub.Wit.		
✓ Verified		
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		

Petitioner states, continued:

- Because this is farm ground which has been under cultivation for many years, it should continue to be cultivated during the administration of the estate in order to produce income to the estate from the assets owned by the estate;
- It is in the best interests of the estate and the heirs to the estate that the Administrator be allowed to continue to operate the business while he goes through the process of selling the real property.

Petitioner requests an order allowing him to continue to operate the Decedent's farming business.

Declaration Under Penalty of Perjury filed by DAVID BRINKLEY on 7/22/2015 states:

- The principal asset of this estate is agricultural real property which is planted in cotton, tomatoes, alfalfa, cantaloupes, and wheat;
- He has been farming this real property since 1984, when his father, Decedent's husband **SHERMAN BRINKLEY** (DOD 2/18/2010) retired;
- His arrangement to farm this property was documented before either of his parents died;
- The Lease Agreement which he entered into with his parents (*copy attached as Exhibit A*), became effective 1/1/2008, and by its terms is to remain in effect until 1/1/2018;
- Since becoming Administrator of the estate, he has continued to farm the real property subject to the Lease, all of which is owned by the estate;
- His business, **DAVID BRINKLEY FARMS**, has continued to pay the estate the rent required under the terms of the Lease; (*please refer to Profit and Loss statements of Petitioner's business for 2011, 2012, 2013 and 2014, attached as Exhibits B, C, D and E; and crop report attached as Exhibit F*);
- It is his strong belief that it is in the best interest of the estate that the Court allow him to continue to operate the farming business with the assets of the estate at least until the current Lease expires [*on 1/1/2018*] or this estate is wound up, whichever occurs first.

NEEDS/PROBLEMS/COMMENTS, continued:

3. Notice of Hearing filed 7/27/2015 indicates in Item 1 that notice is given that Petitioner filed a *Petition for Order to Continue to Operate Decedent's Business Under Probate Code Section 9760; and to Borrow Funds Under Probate Code Section 9760*, and indicates that a copy of the Petition and a copy of the Declaration Under Penalty of Perjury was served with the notice. However, the information in Item 1 of the notice is inconsistent with the actual *Petition*, which is captioned *Petition for Order to Continue to Operate Decedent's Business Under Probate Code Section 9760*.
4. It appears the Petitioner as Administrator has been operating Decedent's business for longer than 6 months from the date letters were issued to Petitioner on 8/30/2011, in violation of Probate Code § 9760(b) such that the instant Petition should have been brought in approximately **February 2012**.
5. Proposed order finds that Petitioner may continue to operate the Decedent's farming business during the balance of the term of the Lease [*which expires 1/1/2018*], or until the administration of the estate is completed, whichever occurs first. Proposed order has been interlineated to strike the finding regarding operating the business for the balance of the term of the Lease, pursuant to Probate Code § 12201(c).

Petitioner: Janet Marie Wilson (Pro Per – Guardian - Petitioner)
 Petition for Visitation Modification

		JANET MARIE WILSON , Guardian, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note re history:</u> Minute Order 5/20/15 provides that Mr. Carranza was to have supervised visits every Saturday from 10am-1pm at the McDonalds in Kerman.</p> <p>On 6/15/15, Mr. Carranza filed a Petition for Termination of Guardianship that was set for 8/17/15.</p> <p>On 7/22/15, Petitioner filed an objection to Mr. Carranza's petition, along with this petition to modify visitation, which was set separately for 9/1/15.</p> <p>8/17/15, the Court ordered unsupervised visitation for Mr. Carranza on the first and second Sunday of every month. See Minute Order of 8/17/15 for details.</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing on: - Mavrilio Carranza (Father) 3. The Court may also require notice to the mother and other relatives, if appropriate.
		Father: MAVRILIO D. CARRANZA	
		Mother: RUTHIE STONE	
		Maternal grandfather: Richard Martin Mehall	
		Paternal grandfather: Samuel Carranza	
		Paternal grandmother: Adelina Carranza	
	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		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Dale W. Balagno Revocable Trust

Atty Kruthers, Heather (for Public Administrator – Petitioner)
 Atty Armo, Lance E. (for Joseph Balagno – Beneficiary)
 Atty Gromis, David Paul (for Nicholas Kovacevich – Former Trustee)
 Atty Johnson, Summer (for Mary Pond – Respondent)

First and Final Account and Report of Successor Trustee; Petition for Allowance of Compensation to Successor Trustee and her Attorney; and for Distribution

	FRESNO COUNTY PUBLIC ADMINISTRATOR , Successor Trustee, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Status Report of Counsel for Mary Pond and Request for Continuance of Hearing on First and Final Account was filed 7/27/15. Attorney Summer Johnson states after review of the accounting, several items came to her attention for which answers were not easily obtained. The status report requested additional time to discuss and resolve the issues in lieu of filing an objection.</p> <p>Minute Order 7/28/15: Parties request and agree to preliminary distribution to each of the four beneficiaries in the amount of \$50,000.00.</p> <p>Note: Order After Hearing Authorizing Preliminary Distribution was entered 7/29/15.</p> <p>Note: Order Re Attorney's Fees and Costs was entered 8/10/15 and mailed to attorneys David Gromis, Lance Armo, and Heather Kruthers. (It does not appear that attorney Summer Johnson, who represents Ms. Pond, was included in this mailing.)</p> <p>Note: The amounts authorized in the 8/10/15 Order do not appear to exceed the \$25,000.00 reserved for this purpose in this petition.</p> <ol style="list-style-type: none"> 1. Need receipts for the preliminary distribution from Linda Sue Balagno, Lori Jo Brown, Joseph Dale Balagno, and Mary Pond. 2. Given the preliminary distribution, need recalculation of final distribution and revised order.
	Account period: 10/15/13 – 5/27/15	
	Accounting: \$560,600.75	
	Beginning POH: \$516,776.66	
	Ending POH: \$503,035.65	
	(\$464,108.72 cash plus personal property)	
	Successor Trustee (Statutory): \$14,129.06	
	Successor Trustee (Extraordinary): \$248.00 (preparation, filing tax returns)	
	Bond fee: \$2,102.27	
	Costs: \$141.50 (to pay to Fresno Superior Court for certified copies)	
	Reserve: \$400.00 (for payment of any tax preparation after date of this account)	
	Reserve: \$25,000.00 (pursuant to settlement agreement, for fees that may be awarded to the former trustee and his attorney)	
	Petitioner states the children and longtime girlfriend of Dale W. Balagno entered into a settlement agreement regarding distribution of assets as follows:	
	Linda Sue Balagno: \$101,880.95 cash plus Bersa handgun, 2005 Ford Mustang, 1965 Chevy Pickup, and 1985 Harley Davidson	
	Lori Jo Brown: \$101,880.96 cash plus Colt pistol, Smith & Wesson handgun, 2002 Harley Davidson	
	Joseph Dale Balagno: \$101,880.96 cash plus Beretta handgun, Smith & Wesson handgun, .80 round of ammunition, .25 rounds of ammunition, Yellow ring with stones, Peugeot watch, Harley Davidson watch, Geneva watch, 2005 Harley Davidson	
	Mary Pond: \$101,880.96 cash	
Cont. from 072815		
<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.		
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<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: skc	
	Reviewed on: 8/27/15	
	Updates:	
	Recommendation:	
	File 6 – Balagno	

Attorney Russo, Peter (for Antoinette Fuller – Guardian)
 Attorney Miller, James L (for Orrin Fuller – father)

Probate Status Hearing RE: Proof of Attendance of Anger Management Classes

	ANTOINETTE FULLER , paternal aunt, was appointed Guardian on 05/11/15.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 07/07/15 Minute Order from 07/07/15 states: Mr. Pulido represents that he spoke with Mr. Miller, who stated it was acceptable to proceed without him today. The Court notes that Mr. Fuller has missed two out of three of the anger management classes thus far. The matter is continued for further proof of attendance at each and every class. Said proof is to be filed no later than 08/28/15.</p> <p>As of 08/28/15, no proof of attendance has been filed.</p>
	Minute Order from 05/11/15 set this matter for status and states: The Court grants the general petition forthwith. The Court orders Orrin Fuller to enroll in Anger Management classes, and further orders that they are to take precedence over other classes if there is a scheduling conflict. There is to be no communication between Mr. Fuller and the Guardian other than e-mail. The Court orders visitation on the first and third Sunday of each month from 10am to 4pm at CYS. Each party is responsible for one-half of the costs of the visits, and there shall be no other visits other than those through CYS.	
	Update on Minor’s Progress and Guardian’s Completions filed 06/18/15.	
	Proof of Enrollment in Classes filed 07/01/15 by Orrin Fuller (father) attaches proof of enrollment in 2 classes:	
	1) Coalition for Family Harmony – 16 week anger management program; and	
	2) Coalition for Family Harmony – Batterer’s Intervention Program	
Cont. from 062915, 070715		
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: 08/28/15
		Updates:
		Recommendation:
		File 7 - Fuller

Katherine Preisker Durley aka Katherine P. Durley (Estate)

Case No. 14CEPR00438

Attorney **Martinez, Vincent T. (of Santa Maria for W. Laird Durley – Executor/Petitioner)**
Petition for Final Distribution on Waiver of Accounting; Final Report of Administration; and for Allowance of Ordinary Compensation to Attorney for Ordinary Services

DOD: 03/14/14	W. LAIRD DURLEY , Executor, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. The Petition does not state the dollar value of the property on hand remaining for distribution. Also, the Order for Distribution indicates that the remainder of cash assets will be distributed to W. Laird Durley. <u>Per Local Rule 7.6.1A</u> - All orders or decrees in probate matters must be complete in themselves. Orders shall set forth all matters ruled on by the court, the relief granted, and the names of persons, descriptions of property and/or amounts of money affected with the same particularity required of judgments in general civil matters. Monetary distributions must be stated in dollars, and not as a percentage of the estate. Need revised Order.</p> <p>2. Some of the costs requested appear to be for expenses that are considered by the Court to be part of the cost of doing business as follows: Courtcall - \$460.00 Copies - \$106.75 Postage - \$158.23 Runner Service - \$105.00 Travel expenses - \$247.13 Total: \$1,077.11 See Local Rule 7.17(B)</p> <p style="text-align: right;">Continued on Page 2</p>
	Accounting is waived.	
	I & A - \$2,797,363.54	
	POH - Amount not stated in	
Cont. from	Petition	
<input type="checkbox"/> Aff.Sub.Wit.	Executor - waived	
<input checked="" type="checkbox"/> Verified	Attorney - \$39,612.13 (statutory)	
<input checked="" type="checkbox"/> Inventory	Costs - \$2,387.11 (filing fees, publication, CourtCall Fees, copies, postage, runner fees, and travel expenses for personal appearance at hearings in Fresno County)	
<input checked="" type="checkbox"/> PTC	Closing - \$1,000.00	
<input checked="" type="checkbox"/> Not.Cred.	Distribution, pursuant to Decedent's Will, is to:	
<input checked="" type="checkbox"/> Notice of Hrg	Graham C. Scown - \$100,000.00	
<input checked="" type="checkbox"/> Aff.Mail w/	Julia Parks Durley - \$200,000.00	
Aff.Pub.	W. Laird Durley -	
Sp.Ntc.	<ul style="list-style-type: none"> • 100% interest in real property located at 5090 N. Roosevelt, Fresno; • 50% interest in real property located in Santa Barbara County (APN: 117-030-018); • 12.5% interest in mineral rights located in Santa Barbara County (APNs: 101-070-058, 101-070-068); • 1/3 interest in real property located in Santa Barbara County (APN: 117-170-50) • 50% interest in oil and gas rights for property in Santa Barbara County (APNs: 117-030-018, 117-170-50); • Household furnishings and tangible personal property; • Remainder of Bank of America Bank Account ending in 6825. 	
Pers.Serv.		
Conf. Screen		
Letters 07/25/14		
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		
	Reviewed by: JF	
	Reviewed on: 08/28/15	
	Updates:	
	Recommendation:	
	File 8 – Durley	

8 Katherine Preisker Durley aka Katherine P. Durley (Estate)
Page 2

3. The Petition indicates that two of the accounts listed on the Inventory & Appraisal filed 05/12/15 were later discovered to be pay on death accounts and should not be considered estate assets. The Court may require a Corrected Inventory & Appraisal.

4. The Petition states that real property located at 4884 N. Van Ness, Fresno, was sold during the administration of the estate; however, Petitioner also states that the Van Ness Property is on hand for distribution on page 8. Need clarification and/or amendment or supplement to Petition. It is noted that the Order also lists the Van Ness property on page 3 as part of the property on hand. Need revised Order.

First and Final Report of Personal Representative; Petition for Final Distribution on Waiver of Account; Petition for Payment of Compensation to Personal Representative; and Payment of Compensation to Attorney for Ordinary Services

DOD: 01/29/14	NORMA GADBERRY , Executor, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. The Petition states that the property on hand for distribution consists of cash in the amount of \$175,820.43 plus real property. The Petition requests to distribute all of the property on hand. Therefore it is unclear how the costs of administration are to be paid. Need clarification and/or revised Petition and Order. Note: If requested costs of administration are paid from the cash on hand, the remaining cash to distribute would be \$138,593.81.</p>
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory		
<input checked="" type="checkbox"/> PTC		
<input checked="" type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w/	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters	09/10/14	
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		
	<p>I & A - \$260,013.14 POH - \$260,820.43 (\$175,820.43 is cash)</p> <p>Executor - \$8,200.26 (statutory)</p> <p>Executor costs - \$19,363.60 (per itemization for funeral expenses, medical expenses prior to decedent's death, payment of decedent's final bills, etc.)</p> <p>Attorney - \$8,200.26 (statutory)</p> <p>Attorney costs - \$1,462.50 (for Publication, filing fees, probate referee, certified copies)</p> <p>Distribution, pursuant to Decedent's Will, is to:</p> <p>Church of Christ Caruthers - \$175,820.43 cash plus real property located at 13575 S. Quince Ave., Caruthers</p>	
		Reviewed by: JF
		Reviewed on: 08/28/15
		Updates:
		Recommendation:
		File 9 – Reddell

10 In Re: Gramenz Family Living Trust Agreement Case No. 15CEPR00398

Attorney: Steven S. Picone, (for David Caballero & Baldermar Martinez)

Attorney: Lisa Horton (for Petitioner Rande L Gramenz)

Amended First Account and Report of Trustee and Petition for its Settlement

		RANDE L. GRAMENZ , Successor Trustee, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Proof of service of the Notice of Hearing was 18 days and not 30 days as required by Probate Code §17203.</p>
		Petitioner states settlor, Opal E. Gramenz, died on 12/28/12.	
Cont. from		Account period: 12/29/12 – 6/30/15	
<input type="checkbox"/>	Aff.Sub.Wit.	Accounting - \$1,575,344.83	
<input checked="" type="checkbox"/>	Verified	Beginning POH - \$1,432,128.43	
<input type="checkbox"/>	Inventory	Ending POH - \$1,334,752.81	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Petition states pursuant to Article V section 1 of the trust he has paid his attorney \$5,000.00. Pursuant to Probate Code §15681 he is entitled to reasonable compensation from the Trust. Trust funds totaling \$14,850.00 have been used to pay Trustee's reasonable compensation for his services. This figure was derived from 1% of the total sale price (\$1,485,000) of the duplex.	
<input checked="" type="checkbox"/>	Aff.Mail	<input type="checkbox"/> 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	Petitioner states the decedent has a bank account at Chase with Kenneth Caballero for the purpose of having someone available to sign checks. Kenneth Caballero was a joint owner but never signed a check, deposited or withdrew funds from the account while the Decedent was alive. All of the funds in the account on Decedent's date of death were hers. After Decedent's death, Kenneth Caballero used some of the funds to pay for funeral expenses, but kept the remaining funds. Trustee demanded the funds so that they could be deposited into the trust account but Kenneth Caballero refused. Since Kenneth Caballero kept those funds, then in the sum of those funds (\$59,494.49, after the payment of funeral expenses) will be counted as a preliminary distribution and taken from Kenneth Caballero's distributive share.	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice	Petitioner prays that the Trustee's first account and report be settled, allowed and approved as filed.	
			Reviewed by: KT
			Reviewed on: 8/28/15
			Updates:
			Recommendation:
			File 10 - Gramenz

Amended Petition to Determine Succession to Real Property

DOD: 2/10/15		<p>BRUCE T. JONES, BRETT JONES, and MYREL JONES, siblings, are petitioners.</p> <p>40 days since DOD.</p> <p>No other proceedings.</p> <p>Decedent died intestate.</p> <p>I & A - \$115,000.00</p> <p>Petitioner requests Court determination that Decedent's 100% interest in real property located at 513 W. Cortland in Fresno passes to them in equal shares pursuant to intestate succession.</p>	NEEDS/PROBLEMS/COMMENTS:
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail W/		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: KT</p> <p>Reviewed on: 9/1/15</p> <p>Updates:</p> <p>Recommendation: SUBMITTED</p> <p>File 11 – Jones</p>	

Status RE: Receipt for Blocked Account

	<p>TIFFANY-LIN DIRECTO, Mother, was appointed Guardian of the Estate on 6/16/15 without bond, funds to be placed into a blocked account.</p> <p>At the hearing on 6/16/15, the Court set this status hearing for the filing of the receipt for blocked account.</p> <p>Status Report filed 7/9/15 states funds have not yet been received from either of the two insurance companies (METLIFE and BANNER LIFE). Counsel is informed that it will be a minimum of 7-10 business days before the claims are acted upon and proceeds disbursed. Therefore, Mr. Willoughby requests continuance of 30 days.</p> <p>On 8/18/15, a receipt was filed indicating that funds had been received from Banner Life Insurance Company and placed into a blocked account at EECU.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need receipt for deposit of additional funds from Metlife or written status report pursuant to Local Rule 7.5.</p>
Cont. from 071415		
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: skc
		Reviewed on: 8/27/15
		Updates:
		Recommendation:
		File 12 - Directo

Attorney Willoughby, Hugh W. (for Tiffany-Lin Directo – Mother – Guardian)

Status RE: Receipt for Blocked Account

	<p>TIFFANY-LIN DIRECTO, Mother, was appointed Guardian of the Estate on 6/16/15 without bond, funds to be placed into a blocked account.</p> <p>At the hearing on 6/16/15, the Court set this status hearing for the filing of the receipt for blocked account.</p> <p>Status Report filed 7/9/15 states funds have not yet been received from either of the two insurance companies (METLIFE and BANNER LIFE). Counsel is informed that it will be a minimum of 7-10 business days before the claims are acted upon and proceeds disbursed. Therefore, Mr. Willoughby requests continuance of 30 days.</p> <p>On 8/18/15, a receipt was filed indicating that funds had been received from Banner Life Insurance Company and placed into a blocked account at EECU.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need receipt for deposit of additional funds from Metlife or written status report pursuant to Local Rule 7.5.</p>
Cont. from 071415		
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: skc
		Reviewed on: 8/27/15
		Updates:
		Recommendation:
		File 13 - Directo

14 Izsak Hartman (GUARD/P)

Case No. 15CEPR00508

Petitioner Hartman, Diana Lynn (pro per – maternal grandmother/Petitioner)

Petition for Appointment of Guardianship of the Person

		<u>TEMPORARY EXPIRES 09/01/2015</u>	NEEDS/PROBLEMS/COMMENTS: Minute Order of 08/04/2015: Petitioner is to ask the father about the paternal grandfather and/or check the father's birth certificate for the name in order to have him properly noticed.
		DIANA HARTMAN, maternal grandmother, is Petitioner.	
		<u>Please see petition for details</u>	
Cont. from 071415, 080415			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	n/a	
✓	Conf. Screen		
✓	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LV
			Reviewed on: 08/28/2015
			Updates:
			Recommendation:
			File 14 - Hartman

		<u>TEMPORARY EXPIRES 09/01/15</u>	NEEDS/PROBLEMS/COMMENTS:
		AMEENAH MUHAMMAD , paternal grandmother, is Petitioner.	CONTINUED FROM 07/28/15 Minute Order from 07/28/15 states: Ms. Agrava is to file proofs of service or declarations of due diligence as to the grandparents. As of 08/28/15, no proofs of service or declarations of due diligence have been filed. 1. Need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: a. Paternal grandfather b. Maternal grandparents
Cont. from 072815		Father: HAKIM HAQQ – Consent & Waiver of Notice filed 06/03/15; Personally served on 06/03/15	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	Mother: NATASCA TURNER – Personally served on 05/31/15	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Paternal grandfather: NOT LISTED	
<input checked="" type="checkbox"/>	Aff.Mail	w/ Maternal grandparents: NOT LISTED	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv.	w/ Siblings: MATTHEW ARMSTRONG (16) – served by mail on 07/16/15; DEONDRE TURNER (11); MUJAHID HAQQ (9); JENNA HAQQ (7)	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters	Petitioner states [see Petition for details].	
<input checked="" type="checkbox"/>	Duties/Supp	Court Investigator Jennifer Young filed a report on 07/20/15.	
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt	Objection to Guardianship filed 08/10/15 by Natasca Turner (mother).	
<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		
			Reviewed by: JF
			Reviewed on: 08/28/15
			Updates:
			Recommendation:
			File 15 - Haqq

Petitioner Laurie Lee Cardoza (Pro Per Petitioner)

Petition for Appointment of Guardian of the Person

		NO TEMPORARY REQUESTED	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p><u>Continued from 8/4/2015.</u> Minute Order states examiner notes provided in open court. Ms. Cardoza is to have the declaration she filed on 7/31/2015 [titled <i>Statements for Judge Review</i>] properly served, and any Response by Ms. Wilson is due by 8/27/2015. Ms. Wilson is allowed to call the minor on Wednesdays and Sundays at 7p.m. Parties are to mutually agree as to any visitation.</p> <p>Note: Court records show no response by MaryAnn Wilson has been filed as of 8/27/2015.</p> <p style="text-align: center;">~Please see additional page~</p>	
		LAURIE LEE CARDOZA, maternal cousin, is Petitioner.		
		~Please see Petition for details~		
Cont. from 080415		<p>Court Investigator's Report was filed on 7/28/2015.</p>		
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/ Pet. and Decl.
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" 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 checked="" type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	Clearances			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		Reviewed by: LEG		
		Reviewed on: 8/27/15		
		Updates:		
		Recommendation:		
		File 16 - Nitti		

NEEDS/PROBLEMS/COMMENTS, continued:

1. Need proof of personal service of the *Notice of Hearing* with a copy of the *Petition for Appointment of Guardian, or Consent to Appointment of Guardian and Waiver of Notice* for:
 - Nicola Nitti, II, father, if Court does not find due diligence per Declaration filed 7/6/2015; and filed on 8/5/2015, stating no information or findings were obtained from Petitioner's search.

2. Need proof of service by mail of the *Notice of Hearing* with a copy of the *Petition for Appointment of Guardian, or Consent to Appointment of Guardian and Waiver of Notice* for:
 - Nicola Nitti, paternal grandfather, if Court does not find due diligence per Declaration filed 7/6/2015; and filed on 8/5/2015, stating no information or findings were obtained from Petitioner's search.

Petition for Probate of Will and for Letters Testamentary with IAEA

DOD: 8/14/14		<p>BEVERLY J. LEACH, spouse/named executor without bond, is petitioner.</p> <p>Full IAEA – o.k.</p> <p>Will dated 12/13/05.</p> <p>Residence: Fresno Publication: Fresno Bee</p> <p>Estimated value of the estate: Personal property \$260,000.00 Annual income \$ 10,000.00 Total \$270,000.00</p> <p>Probate Referee: Rick Smith</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> #8 of the Petition does not list the Trustee of the Leach Family Trust. Need proof of service of the Notice of Petition to Administer the Estate on the Trustee of the Leach Family Trust. <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Wednesday, February 3, 2016 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Wednesday, November 2, 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 072115			
<input type="checkbox"/>	Aff.Sub.Wit. S/P		
<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"/>	Aff.Mail W/		
<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		
		<p>Reviewed by: KT</p> <p>Reviewed on: 8/28/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 17 – Leach</p>	

DOD: 2/11/15	RUBEN FRAUSTO, JR., and JENNIFER LUNA,	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: The Court will set status hearings as follows:</p> <ul style="list-style-type: none"> • Tuesday, February 2, 2016 for the filing of the Inventory and Appraisal • Tuesday, November 14, 2016 for the filing of the first account or petition for final distribution <p>If the proper items are on file pursuant to Local Rule 7.5, the status hearings may come off calendar.</p> <p>Reviewed by: skc</p> <p>Reviewed on: 8/27/15</p> <p>Updates:</p> <p>Recommendation: SUBMITTED</p> <p>File 18 – Frausto</p>
	Son and Daughter, are Petitioners and request that RICHARD T. WHEELER be appointed Administrator with Full IAEA without bond.	
Cont. from 072815		
<input type="checkbox"/> Aff.Sub.Wit.	Petitioners are the sole heirs and waive bond.	
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory	Full IAEA – ok	
<input type="checkbox"/> PTC	Decedent died intestate	
<input type="checkbox"/> Not.Cred.	Residence: Fresno	
<input checked="" type="checkbox"/> Notice of Hrg	Publication: Fresno Bee	
<input checked="" type="checkbox"/> Aff.Mail	Estimated value of estate:	
<input checked="" type="checkbox"/> Aff.Pub.	Personal property: \$22,000.00	
<input type="checkbox"/> Sp.Ntc.	Real property: \$156,335.00, encumbered for \$110,580.00	
<input type="checkbox"/> Pers.Serv.	Probate Referee: Steven Diebert	
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		

Petitioner Jessica Roman (Pro Per Petitioner)

Petition for Appointment of Guardian of the Person

		<u>TEMPORARY EXPIRES 9/1/2015</u>	NEEDS/PROBLEMS/COMMENTS:	
		JESSICA ROMAN, mother's first cousin, is Petitioner.	Note: Minute Order dated 7/13/2015 from the temporary hearing states the Court orders that Ronnie Padilla must be notified of the 9/1/2015 general hearing; at the very least Petitioner must send him a message and print a copy of it to file.	
		~Please see Petition for details~		
Cont. from 071315		Court Investigators Report was filed on 8/15/2015.	<p>1. Need proof of service by mail of the Notice of Hearing with a copy of the Petition for Appointment of Guardian, or Consent to Appointment of Guardian and Waiver of Notice, or a Declaration of Due Diligence, for:</p> <ul style="list-style-type: none"> • Ronnie Jackson, paternal grandfather; • Joanne Jackson, paternal grandmother; • Irma Salinas, maternal grandmother; • Destiny Rodriguez, sibling, if age 12 or over; • Hope Aguilar, sibling, if age 12 or over; • Faith Aguilar, sibling, if age 12 or over. 	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			X
<input type="checkbox"/>	Aff.Mail			X
<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 checked="" type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	Clearances			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: LEG	
			Reviewed on: 8/28/15	
			Updates:	
			Recommendation:	
			File 19 - Gonzalez	

		<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS:
		PHYLLIS CAMPBELL , maternal cousin, is Petitioner.	1. The UCCJEA is incomplete. Need minor's residence history for the past 5 years. 2. Need <i>Notice of Hearing</i> . 3. Need proof of service of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for: a. Scott Hobson (father) – <i>personal service required</i> b. Joanna Rowe (mother) – <i>personal service required</i> c. Angel Hobson (paternal grandmother) – <i>service by mail ok</i> d. Stacy (maternal grandmother) – <i>service by mail ok</i>
Cont. from		Father: SCOTT HOBSON	
<input type="checkbox"/>	Aff.Sub.Wit.	Mother: JOANNA ROWE	
<input checked="" type="checkbox"/>	Verified	Paternal grandfather: DECEASED	
<input type="checkbox"/>	Inventory	Paternal grandmother: ANGEL HOBSON	
<input type="checkbox"/>	PTC	Maternal grandfather: DECEASED	
<input type="checkbox"/>	Not.Cred.	Maternal grandmother: STACY	
<input type="checkbox"/>	Notice of Hrg	Petitioner states [see Petition for details].	
<input type="checkbox"/>	Aff.Mail	Sibling: ALEXIS LOPEZ – <i>Consent & Waiver of Notice filed 07/02/15</i>	
<input type="checkbox"/>	Aff.Pub.	Court Investigator Samantha Henson filed a report on 08/26/15.	
<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 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		
			Reviewed by: JF
			Reviewed on: 08/28/15
			Updates:
			Recommendation:
			File 20 – Hobson

Spousal or Domestic Partner Property Petition

DOD: 3/31/15		<p>CLARA FACCIANI, surviving spouse, is petitioner.</p> <p>No other proceedings</p> <p>Will dated 9/22/99 devises entire estate to spouse. First Codicil dated 13/7/01 and Second Codicil dated 5/20/10 do not change the distribution to spouse.</p> <p>Decedent and Petitioner were married in 1946. Decedent was a successful businessman, and the assets of the marriage resulted from his efforts. Thus, such assets were the community property of Decedent and Petitioner.</p> <p>Petitioner requests court confirmation that ½ interest in real property and bank accounts belong to her and that ½ interest passes to her.</p>	NEEDS/PROBLEMS/COMMENTS:
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail W/O		
<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		
			Reviewed by: KT
			Reviewed on: 8/31/15
			Updates:
			Recommendation: SUBMITTED
			File 21 – Facciani

Petitioner: Cynthia Garza Lopez (pro per)

Attorney: Lisa Horton (court appointed for conservatee)

Petition for Appointment of Probate Conservator

		THERE IS NO TEMPORARY. No temporary was requested.	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Court Investigator Advised Rights on 8/11/15</p> <ol style="list-style-type: none"> 1. Petition indicates the proposed conservatee is developmentally disabled. Therefore need proof of service of the Notice of Hearing along with a copy of the Petition, 30 days prior to the hearing, on regional center pursuant to Probate Code §1822(e). 2. Need Capacity Declaration re: medical consent. 	
		CYNTHIA G. LOPEZ, mother, is petitioner.		
Cont. from		Please see petition for details.		
	Aff.Sub.Wit.	<p>Court Investigator Dina Calvillo's Report filed 8/26/15.</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			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
			Reviewed by: KT	
			Reviewed on: 8/31/15	
			Updates:	
			Recommendation:	
			File 22 – Valenzuela	

**Petition for Probate of Will and for Letters of Administration with Will
 Annexed; Authorization to Administer Under the independent
 Administration of Estates Act**

DOD: 4/3/15		<p>PASTOR RON SHIRLEY is petitioner and requests LINDA P. MCCLOUD, former spouse of the Decedent and named executor be appointed as Administrator with Will Annexed and without bond.</p> <p>Full IAEA – o.k.</p> <p>Will dated: 7/31/1995</p> <p>Residence: Fresno Publication: Fresno Business Journal</p> <p>Estimated value of the Estate: Personal property - \$1,423,438.00 Real property - \$ 459,836.00 Total - \$1,883,274.00</p> <p>Probate Referee: Steven Diebert</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Original Will. 2. Need Notice of Petition to Administer Estate. 3. Need proof of service of the Notice of Petition to Administer the Estate on: <ol style="list-style-type: none"> a. Jerry Lee McCloud b. Shonda Lyn Clements c. Linda P. McCloud d. Educational Employees Credit Union. e. Victory Life Center Church. 4. Petitioner states that bond should be waived because the will waives bond for Linda P. McCloud as executor. However, Probate Code §6122 (a)(3) states unless the Will expressly provides otherwise, if after executing a will the testator's marriage is dissolved the dissolution revokes any provision of the will nominating the former spouse as executor. It appears bond should be set at \$1,883,274.00. 5. #5(a)3 or 5(a)4 was not answered re: registered domestic partner. 6. #5(a)7 or 5(a)8 was not answered re: issue of predeceased child. <p align="center">Please see additional page</p>	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			S/P
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			X
<input type="checkbox"/>	Aff.Mail			X
<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: KT		
		Reviewed on: 8/31/15		
		Updates:		
		Recommendation:		
		File 23 – McCloud		

Note: If the petition is granted, status hearings will be set as follows:

- **Wednesday, October 7, 2015** at 9:00 a.m. in Department 303, for the filing of the bond, if required.
- **Wednesday, February 10, 2016** at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.
- **Wednesday, November 2, 2016** at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.

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.

Second and Final Report of Administration of Estate by LaVerne T. Coelho as Executor, and Petition for Final Distribution on waiver of Account, and Waiver of Compensation of Personal Representative and Attorney

DOD: 4/7/96		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Order signed 8/27/15. See Minute Order of 8/18/15.
Cont. from 071415, 081815		
	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: skc
		Reviewed on: 8/27/15
		Updates:
		Recommendation:
		File 24 - Coelho

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

DOD: 03/06/14	KAREN GREEN , Executor, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u> Order Approving First and Final Account signed 08/28/15</p>
	Accounting is waived.	
	I & A - \$211,977.42	
	POH - \$219,355.46	
Cont. from 081815	(\$8,355.46 is cash)	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory	Executor - waived	
<input type="checkbox"/> PTC		
<input checked="" type="checkbox"/> Not.Cred.	Attorney - \$7,239.55 (statutory)	
<input checked="" type="checkbox"/> Notice of Hrg	Distribution, pursuant to decedent's will, is to:	
<input checked="" type="checkbox"/> Aff.Mail w/		
<input type="checkbox"/> Aff.Pub.	Karen Green - 100% interest in Union Bank Checking Account, 100% interest in 4 parcels of real property and 100% interest in household furniture and furnishings	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters 05/21/14		
<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: JF
		Reviewed on: 08/28/15
		Updates:
		Recommendation:
		File 25 – Christian

Petitioner Estrada, Richard Lucio (pro per – maternal grandfather)
 Petitioner Estrada, Jacqueline (pro per – maternal grandmother)

Petition for Appointment of Temporary Guardian of the Person

		<u>GENERAL HEARING: 10/19/15</u>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. 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> for: Jerry Leos (father) - unless diligence is found, Declaration of Due Diligence filed 08/24/15 states that his current whereabouts is unknown. 2. UCCJEA is incomplete. Need child's residence addresses for past 5 years.
		<p>RICHARD ESTRADA and JACQUELINE ESTRADA, maternal grandparents, are Petitioners.</p>	
Cont. from			
	Aff.Sub.Wit.	Father: JERRY LEOS – <i>Declaration of Due Diligence filed 08/24/15</i>	
✓	Verified		
	Inventory		
	PTC	Mother: ELIZABETH ESTRADA – <i>Personally served on 08/21/15</i>	
	Not.Cred.		
✓	Notice of Hrg	Paternal grandfather: JOHN LEOS – <i>Personally served on 08/20/15</i>	
	Aff.Mail	Paternal grandmother: DECEASED	
	Aff.Pub.		
	Sp.Ntc.	Siblings: CYNTHIA CARRISALES – <i>Personally served on 08/21/15,</i>	
✓	Pers.Serv.	THOMAS CARRISALES, JERRY LEOS – <i>Jerry & Thomas personally served on 08/20/15</i>	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp	Petitioner states [see Petition for Details].	
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed by: JF	
		Reviewed on: 08/31/15	
		Updates:	
		Recommendation:	
		File 27 – Leos	

28 Evelyn Villarreal (GUARD/P) Case No. 15CEPR00804

Petitioner Barra, Monique Marie (Pro Per – Maternal Aunt)

Petitioner Martinez, Yvette (Pro Per – Maternal Aunt)

Petition for Appointment of Temporary Guardianship of the Person

		<u>GENERAL HEARING 10/20/2015</u>	NEEDS/PROBLEMS/COMMENTS:
		MONIQUE MARIE BARRA and YVETTE MARTINEZ , maternal aunts, are petitioners.	
		<u>Please see petition for details</u>	<ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Temporary Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Juan Villarreal Jr. (Father) • Natalie Marie Grado (Mother) 3. Need Confidential Screening Form, Mandatory Judicial Council Form GC-212 for petitioner, Monique Marie Barra.
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	x	
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	x	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: LV
			Reviewed on: 08/31/2015
			Updates:
			Recommendation:
			File 28 – Villarreal