



ATTENTION

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

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

Thank you for your patience.

Probate Status Hearing RE: Receipt of Transfer

Age:	On 7/2/15, this Court ordered proceedings transferred to the Superior Court of California, County of Santa Barbara.	NEEDS/PROBLEMS/COMMENTS: 1. Need receipt from Santa Barbara County Superior Court showing file received, case created.
DOD:		
Cont. from	Notice of Transfer of Papers and Pleadings indicates mailing on 7/23/15.	
Aff.Sub.Wit.		
Verified	Certified mail return receipt filed 7/30/15 indicates receipt by Santa Barbara Superior Court on 7/27/15; however, no receipt has been received from the Probate Department indicating that the file has been received and a new case created there.	
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		Reviewed by: skc
Aff. Posting		
Status Rpt		Reviewed on: 9/2/15
UCCJEA		
Citation		Updates:
FTB Notice		
		Recommendation:
		File 1 – Chapman

2A Paul Harvey Wallace (Estate)
Atty Donaldson, Larry A. (pro per – former Executor)
Atty Kruthers, Heather H. (for Public Administrator – successor Administrator)

Case No. 08CEPR00294

Amended Trust Accounting for 2007, 2008, 2009, 2010, 2011, 2012 and Partial Accounting 2013

DOD: 06/22/07	<p>LARRY A. DONALDSON, friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.</p> <p>The Court accepted Mr. Donaldson's withdrawal as executor on 7/26/13 and appointed the Public Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>See Page 12 for a related matter.</p> <p><u>CONTINUED FROM 07/29/15</u></p> <ol style="list-style-type: none"> The accounting does not comply with the Probate Code, specifically the format for accountings outlined in Probate Code §1060. In addition the accounting appears to be for the Paul Harvey Wallace Trust. The Paul Harvey Wallace Trust is not before the court. Mr. Donaldson needs to file an accounting for the Estate of Paul Harvey Wallace.
Cont. from 040714, 050514, 070714, 090814, 102314, 012115, 032515, 062415, 072915		
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: 09/02/15
		Updates:
		Recommendation:
		File 2A – Wallace

2B Paul Harvey Wallace (Estate)

Case No. 08CEPR00294

Atty Donaldson, Larry A. (former Executor)

Atty Kruthers, Heather H. (for Public Administrator – Successor Administrator)

Order to Show Cause Re: Failure to Appear; Imposition of Sanctions in the Amount of \$600.00

DOD: 06/22/07	<p>LARRY A. DONALDSON, friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.</p> <p>On 07/26/13, LARRY DONALDSON resigned as Executor and the PUBLIC ADMINISTRATOR, was appointed as Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.</p> <p>Minute order from 12/05/13 set this matter for an Order to Show Cause and states: The Court sets the matter for an Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to appear and imposition of sanctions in the amount of \$600.00. The Court sets a further Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to provide information to the successor administrator timely and imposition of sanctions in the amount of \$800.00. Larry Donaldson is ordered to be personally present on 01/02/14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 07/2915</u></p> <p>Minute Order from 06/24/15 states: The Court imposes the previously ordered \$600.00 sanction as to Mr. Donaldson and orders that it be paid within one week.</p> <p>As of 09/02/15, it does not appear that the sanctions have been paid.</p>
Cont. from 010214, 013014, 022014, 041714, 050514, 070714, 090814, 102314, 012115, 032515, 062415, 072915		
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: 09/02/15		
Updates:		
Recommendation:		
File 2B – Wallace		

2C Paul Harvey Wallace (Estate)

Case No. 08CEPR00294

Atty Donaldson, Larry A. (former Executor)

Atty Kruthers, Heather H. (for Public Administrator – Successor Administrator)

Order to Show Cause Re: Failure to Provide Information to the Successor Administrator Timely; Imposition of Sanctions in the Amount of \$800.00

DOD: 06/22/07	<p>LARRY A. DONALDSON, friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.</p> <p>On 07/26/13, LARRY DONALDSON resigned as Executor and the PUBLIC ADMINISTRATOR, was appointed as Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.</p> <p>Minute order from 12/05/13 set this matter for an Order to Show Cause and states: The Court sets the matter for an Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to appear and imposition of sanctions in the amount of \$600.00. The Court sets a further Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to provide information to the successor administrator timely and imposition of sanctions in the amount of \$800.00. Larry Donaldson is ordered to be personally present on 01/02/14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 07/29/15</u></p> <p>Minute Order from 06/24/15 states: The Court imposes the previously ordered \$800.00 sanction as to Mr. Donaldson and orders that it be paid within one week.</p> <p>As of 09/02/15, it does not appear that the sanctions have been paid.</p>
Cont. from 010214, 013014, 022014, 050514, 070714, 090814, 102314, 012115, 032515, 062415, 072915		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
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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: 09/02/15	
	Updates:	
	Recommendation:	
	File 2C – Wallace	

First and Final Account and Petition for Settlement

DOD: 06/22/07		<p>LARRY DONALDSON, former personal representative, is Petitioner.</p> <p>Account period: 06/22/07/ - 07/26/13</p> <p>Accounting: \$1,622,112.59 Beginning POH: \$1,619,273.76 Ending POH: \$25,286.68</p> <p>Fees for former personal representative or attorney <u>NOT ADDRESSED</u></p> <p>Petitioner states: Pursuant to the provisions of decedent's will, Petitioner distributed assets of the estate to himself as Trustee of the 2007 Paul Harvey Wallace Family Trust dated May 2, 2007 (the "Trust"). In his capacity as trustee, Petitioner deposited refund checks received in the name of the Estate of Paul Harvey Wallace directly into accounts for the Trust. Petitioner executed a deed and conveyed title to the decedent's residence to the Trust. Various bank accounts standing in the name of Paul Harvey Wallace were closed and the monies were transferred into accounts held in the name of the Trust. All debts of the deceased were paid by Petitioner in his capacity as trustee of the Trust.</p> <p>Petitioner has paid probate costs and expenses directly from the Trust, including fees for attorney services related to legal work required for this probate proceeding.</p> <p>Petitioner prays for an Order settling the First and Final Account.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>See page 18 for related accounting of the Paul Harvey Wallace Trust</p> <ol style="list-style-type: none"> Petitioner states that he paid attorney's fees for legal work required for this estate from the Paul Harvey Wallace Family Trust. Need information regarding the fees paid. Fees paid to a personal representative or his or her attorney are subject to court approval prior to payment and are set forth in Probate Code § 10800. Inventory & Appraisal filed 06/24/13 indicates that it is a partial #1. No Final Inventory & Appraisal has been filed and the Petition does not discuss the Inventory & Appraisal at all. Need clarification as to whether the partial #1 filed 06/24/13 is the final Inventory. The Petition does not address whether Notice to Creditor's was sent. <p>Note: Declaration of Larry A. Donaldson in Support of Trustee's Report and Account for Petition for Settlement was filed in this estate matter on 08/31/15. However, the Declaration refers to the Trust Accounting and it appears this Declaration should have been filed in case no. 14CEPR00601 regarding the Trust.</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 type="checkbox"/>	Not.Cred. x		
<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 06/18/08		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202 n/a		
<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 n/a		
		<p>Reviewed by: JF</p> <p>Reviewed on: 09/03/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 2D – Wallace</p>	

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Request for Dismissal was entered 8/24/15.</p> <p>General hearing set for 9/28/15 has also been taken off calendar.</p>	
Cont. from 081215			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail		W
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		X
	Conf. Screen		
	Letters		X
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed by: skc	
		Reviewed on: 9/2/15	
		Updates:	
		Recommendation:	
		File 3 – Estrada	

4 Ariel Golden, Dallas Kerns, Dylan Kerns & Dewayne McCoy (GUARD/P)

Case No. 09CEPR00065

Guardian Crawford, Angelita C. (Pro Per – Guardian)

Petitioner English, Anita (Pro Per – Mother)

Review Re: Visitation

Dallas age: 10	<p>ANITA R. ENGLISH, mother, is petitioner.</p> <p>ANGELITA CRAWFORD, maternal grandmother, was appointed guardian of Ariel on 4/22/2009 and was appointed guardian of Dallas, Dylan and Dwayne on 1/12/13.</p> <p>Minute Order of 06/03/2015 set this Review regarding Visitation. Minute Order states: Anita English states that her Petition for Visitation only pertains to Dewayne; she does not want to visit with the other minors at this time. The Court orders supervised visitation for Ms. English for 2 hours per week at CYS; Ms. English is to pay 100% of the cost of said visits.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Petition is as to Dallas Kerns, Dylan Kerns, and Dewayne McCoy only.</p>
Dylan age: 6		
Dewayne age: 3		
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: LV
		Reviewed on: 09/03/2015
		Updates:
		Recommendation:
		File 4 – Golden/Kerns/McCoy

Petition for Surcharge Against Former Administrator for Breach of Fiduciary Duty

DOD: 7/11/08	PUBLIC ADMINISTRATOR , Successor Administrator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>SEE PAGE 2</u>
Cont. from 070815	Petitioner states Jo Anne Ruth Fuchs was appointed as administrator of the estate on 12/8/09 with \$30,000.00 bond, which was filed 1/8/10. Ms. Fuchs was removed as administrator per minute order 3/15/13.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory	A partial I&A was filed by the former administrator consisting of vehicles and trailers, total value \$8,100. The PA filed a final I&A on 1/28/15 showing an additional value of \$15,950 consisting of vehicles and trailers. The total appraised value of the estate is \$24,050.	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	Ms. Fuchs sold the following items from the 2010 I&A:	
<input type="checkbox"/> Aff.Pub.	<ul style="list-style-type: none"> • 1955 Peterbilt Truck: \$400 • 1956 Peterbilt Truck: \$400 • 1970 Chevrolet Pickup: \$7,000 	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Ms. Fuchs sold the following items from the 2015 I&A:	
<input type="checkbox"/> Conf. Screen	<ul style="list-style-type: none"> • 1979 Boat Trailer (50%): \$450 • 1979 Belmont Boat: \$5,000 • 1973 Trailer: \$150 • 1982 Chevy El Camino: \$5,000 • 1970 Chevrolet Pickup (50%): \$3,750 	
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt	The PA sold the following items from the 2010 I&A:	
<input type="checkbox"/> CI Report	<ul style="list-style-type: none"> • 1970 trailer dolly: \$300 	
<input type="checkbox"/> 9202	The PA sold the following items from the 2015 I&A:	
<input checked="" type="checkbox"/> Order	<ul style="list-style-type: none"> • Striped Motorboat: \$200 • Flatbed Utility Trailer: \$1,000 • Misc. motors and parts: \$400 	
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt	The PA was able to recover \$1,900 worth of assets to sell, so Ms. Fuchs misappropriated \$22,150 worth of assets. She admitted to the PA that she sold the items and kept the money. Therefore, she should be surcharged the amount of \$22,150.	
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice	Petitioner requests an order that:	
	<ol style="list-style-type: none"> 1. The Court find that Jo Ann Ruth Fuchs breached her fiduciary duty as personal representative of the above-named estate; 2. The Court find that Ms. Fuchs' breach cost the estate the amount of \$22,150 and surcharge her that amount; 3. The Court make an order that Western Surety Company, or any successor of that company, be ordered to pay the bond of \$22,150 to the PA; and 4. The Court make any other proper orders. 	
		Reviewed by: skc
		Reviewed on: 9/2/15
		Updates:
		Recommendation:
		File 6 - Esparza

Page 2

NEEDS/PROBLEMS/COMMENTS:

1. Two of the items sold by Ms. Fuchs were inventoried on the 2015 I&A filed by the PA as follows:

- 50% interest in 1979 Boat Trailer \$450 (100% \$900)
- 50% interest in 1970 Chevrolet Pickup \$3,750 (100% \$7,500)

However, in the Judgment Determining Ownership filed 12/9/10, the Court found that those two items, among others, were owned by Albert Esparza as sole title holder.

Need clarification as to why the I&A lists them at 50% ownership, and why Ms. Fuchs shouldn't be surcharged for the entire value of each item.

2. Examiner notes the following additional discrepancies regarding the I&As:

- Judgment Determining Ownership filed 12/9/10 included a 1993 Chevrolet Silverado Pickup; however, this vehicle is not identified in either of the I&As filed. What happened to this vehicle?

- The Partial I&A filed 9/29/10 by Ms. Fuchs included a 1970 Chevrolet pickup valued at \$7,000. The Final I&A filed 1/28/15 includes the same 1970 Chevrolet pickup, but this time it was valued at a 50% interest of \$7,500 (not \$7,000) or \$3,750 (as noted in #1 above).

- The Judgment Determining Ownership filed 12/9/10 included Item #9: "A boat being refurbished and currently unregistered," with no other identifying characteristics. The Final I&A filed 1/28/15 includes Item #1: "Yellow, White, and Green Striped Motorboat (without motor)" valued at \$200. Is this the same boat? Need clarification.

- The Judgment Determining Ownership filed 12/9/10 included Item #10: "Various tools and equipment belonging to decedent." The Final I&A filed 1/28/15 includes Item #3: "Miscellaneous Motors and Parts" valued at \$400. Do these descriptions refer to the same items? Need clarification.

Based on the above discrepancies, it appears supplemental or corrected I&A may be appropriate.

Petitioner Candelario Ybarro, Jr. (Pro Per Petitioner)

Petition for Visitation

		CANDELARIO YBARBO, JR., father, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		DEBRA MACIAS, non-relative (former girlfriend of child's father), was appointed Guardian on 8/29/2011.	<ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i> and proof of 15 days' service prior to hearing of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Visitation or Consent and Waiver of Notice</i>, for: <ul style="list-style-type: none"> • Debra Macias, Guardian. 2. Petitioner previously reported that he is of Native American Ancestry – of the Apache Tribe and of another tribe in Alaska, but could not remember the tribe name. Notice pursuant to the Indian Child Welfare Act (ICWA) was not provided at the time the guardianship was granted on 8/29/2011. <i>Notice of Child Custody Proceeding for Indian Child</i> (Form ICWA-030) is required for this matter to proceed, which the Court will serve on necessary agencies, including the Bureau of Indian Affairs. File contains a blank copy of this form for completion and return to the Probate Court Clerk immediately for service to required agencies.
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.	~Please see Petition for details~	
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	ICWA		X
<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 type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	X	
<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: LEG
			Reviewed on: 9/2/15
			Updates:
			Recommendation:
			File 7 – Ybarbo

8 Faith Amariah Esqueda (GUARD/P)

Case No.11CEPR00602

Petitioner **Amalia Molly Dominguez (Pro Per – Maternal Grandmother – Petitioner)**

Petition for Appointment of Guardian of the Person (Prob. Code §1510)

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 7/29/15:</u> This matter is short set for proof of termination of the VA guardianship so that this Court can make temporary orders.</p> <p><u>Minute Order 8/5/15:</u> Petitioner reports that the paternal grandmother’s name is Rosa Esqueda; proper service is to be effected. Additionally, Ms. Dominguez is to inquire as to the paternal grandfather’s name and make attempts to locate him for service.</p> <p>1. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Paternal Grandfather (not identified) - Paternal Grandmother Rosa Esqueda</p>	
Cont. from 062415, 072915, 080515				
<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: skc		
		Reviewed on: 9/2/15		
		Updates:		
		Recommendation:		
		File 8 – Esqueda		

Petition for Visitation

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> Shalon Moon, Mother, filed a Petition for Termination of Guardianship on 4/15/15 that was heard on 6/16/15. On 6/16/15, the Court denied the petition and ordered supervised visits for Ms. Moon. On 8/24/15, Ms. Moon filed a new Petition for Termination of Guardianship that is set for hearing on 10/26/15.</p>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			w/o
	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: 9/2/15	
			Updates:	
			Recommendation:	
			File 9 – White	

Petitioner Milton, Shawn Lee (Pro Per Petitioner, Father)

Attorney Splivalo, Michael (for Michael W. Purkey, Jr., and Julie E. Cable Skaggs, Guardians)

Petition for Visitation

	SHAWN LEE MILTON, father, is Petitioner.		NEEDS/PROBLEMS/COMMENTS:
	MICHAEL W. PURKEY, JR., and JULIE E. CABLE SKAGGS, mother's step-grandfather and the step-grandfather's fiancé, were appointed Co-Guardians on 11/21/2013.		
	~Please see Petition for details~		<u>Continued from 7/22/2015.</u> Minute Order states examiner notes provided in open court.
	Declaration filed by Petitioner Shawn Milton on 6/23/2015.		
Cont. from 072215			Note: Order on Ex Parte Petition for Visitation filed 7/2/2015 set this matter for hearing on 7/22/2015, and requires Petitioner to serve notice to the Guardians with a copy of the petition no later than 15 days prior to the hearing.
Aff.Sub.Wit.			
✓ Verified			The following issues from the last hearing remain:
Inventory			
PTC			<ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service of 15 days' notice prior to hearing of the Notice of Hearing along with a copy of the Petition for Visitation pursuant to the Order on Ex Parte Petition for Visitation and Probate Code § 1460 for the following: <ul style="list-style-type: none"> • Michael W. Purkey, Co-Guardian, • Julie E. Cable Skaggs, Co-Guardian.
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: LEG
			Reviewed on: 9/2/15
			Updates:
			Recommendation:
			File 12 – Milton

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

DOD: 2/24/14	RACHELLE IRELAND , Daughter, was appointed Executor with Full IAEA without bond on 4/16/15. Letters issued 4/17/15.	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Minute Order 6/12/15: Counsel requests a continuance. The Court informs counsel that she should be checking at least weekly to aid in ensuring that Gary Pritchard does not again attempt to sell the estate real property without the personal representative's knowledge.</p> <p>Minute Order 7/15/15: Counsel requests 60 days.</p> <p>Note: On 7/24/15, a Notice of Proposed Action was filed indicating short sale of the residence for \$126,000.00 on or after 8/8/15.</p> <p>1. Need First Account or Petition for Final Distribution.</p>
	At the hearing on 4/16/15, the Court set this status hearing re filing the first account or petition for final distribution.	
Cont. from 061215, 071515	Final I&A filed 5/16/14 indicates a total estate value of \$199,122.60.	
Aff.Sub.Wit.	Supplemental I&A filed 7/29/14 indicates an additional asset valued at \$43,919.00.	
Verified	Various receipts have been filed in connection with distribution of misc. personal effects.	
Inventory	Various creditor's claims have also been filed.	
PTC	Status Report filed 6/10/15 states there are two properties: a rental property that has been listed for sale since October 2014, and a one-half interest in a residence that the decedent owned with her partner, Gary Pritchard, both in poor condition. The house was also listed for sale in October 2014. Executor tried for several months to lower the sale price or do a short sale, but Gary would not agree or sign or provide any required documents. It has been very difficult dealing with Gary and for six months he would not pay any money towards the mortgage, even though he is on the loan and living there. He has finally decided to move forward with a short sale, and the house is currently vacant. The attorney recently received a call from Lou Rodriguez from Community Housing of Fresno, who informed her that Gary is trying to do a short sale, but he needed the estate's approval. Mr. Rodriguez stated that Gary did not tell him that the estate owned one-half of the property until the bank required the estate's approval. There is a buyer, and the estate is waiting to hear back whether the bank will accept the offer. The short sale could take three to six months to complete, but there is a possible \$5,000 cash back short sale incentive for the estate to complete short sale rather than letting it foreclose. Ms. Horton requests a 90 day continuance.	
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Page 2

Status Hearing Report filed 7/13/15 states on 6/16/15, she spoke on the phone at length with Realtor Russell Smith about the listing of the North Fork rental property. The sale price was recently reduced from \$105,000 to \$98,000, and there is an \$81,000 mortgage on the property. Mr. Smith stated that the wooden post holding the sale sign has been stolen several time, and that the neighborhood is not good. The house cannot qualify for an FHA loan so they are not reaching a majority of qualified buyers. Most homes sell in the summertime due to people looking for vacation homes, but there has been a decrease in tourism and activity the past couple of years. There were several evacuations due to forest fires and fire insurance rates have risen significantly. There are a couple of other listings in the area that have been on the market for over three years in better condition.

The Decedent's Fresno residence was also in poor condition, and was listed for sale, but the actual value is less than the outstanding mortgage of over \$156,000. Ms. Horton left a message for Lou Rodriguez from Community Housing of Fresno, who called back 6/17/15 and informed her that they have not heard back from the bank whether the \$126,000 cash offer was accepted.

On 7/7/15, Mr. Rodriguez had still not heard back from the bank. On 7/13/15, Ms. Horton called Mr. Rodriguez for an update. He stated that the bank required one of the forms to be corrected. He submitted the corrected form on 7/8/15 and is now waiting for an answer back from the bank.

Once they know what the buyer will accept and the terms of sale, a Notice of Proposed Action will be sent out. Per Mr. Rodriguez, the short sale process will take anywhere from 10-30 days to complete. There is a possible \$5,000 cash back short sale incentive for the estate to complete short sale rather than letting it foreclose.

Per the recorder's website, no deeds have been recorded since 2006.

The estate cannot close until both properties are sold, so Attorney Horton requests continuance for 60 days for further status.

Attorney Janisse, Ryan M. (for Dianne E. Coolidge, Administrator)

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

DOD: 2/18/2014	<p>DIANNE E. COOLIDGE, spouse, was appointed Administrator with Limited IAEA with bond of \$27,000.00.</p> <p>Letters issued on 10/14/2014.</p> <p>Pursuant to Probate Code § 8800(b), <i>Corrected Final Inventory and Appraisal</i> was due filed 1/13/2015 showing an estate value of \$50,000.00.</p> <p>Pursuant to Probate Code § 12200, first account and/or petition for final distribution is due 10/14/2015.</p> <p>Minute Order dated 7/9/2014 from the hearing on the petition for letters of administration set this status hearing on 9/9/2015 for filing of the first account and/or petition for final distribution.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: <i>Petition for Instructions Regarding Farm Lease Agreement and Proceeds of Crop</i> was filed by Dianne E. Coolidge on 8/5/2015 and is set for hearing on 9/21/2015.</p> <p>Note: <i>Amended Order Appointing Administrator</i> was filed 9/22/2014, with <i>Letters</i> issuing on 10/14/2014 after filing of proof of bond. Therefore, the status hearing set by Court on 7/9/2014 is premature for the filing of the first and/or final account, as the account is not due until 10/14/2015. Court may wish to set a status hearing for the filing of the first and/or final account at the time the <i>Petition for Instructions</i> is heard on 9/21/2015.</p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<p>Reviewed by: LEG</p> <p>Reviewed on: 9/2/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 14 - Coolidge</p>

Attorney Del Castillo, Thomasito (for Bret Helgren, Executor)

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

DOD: 12/19/2013		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;">OFF CALENDAR</p> <p>Judgment of Final Distribution on First and Final Account filed 6/3/2015.</p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LEG
		Reviewed on: 9/3/15
		Updates:
		Recommendation:
		File 16 – Chadwick

DOD: 1/18/14	<p>SANDRA BROWN was appointed Executor with Full IAEA without bond on 3/19/15. Letters issued on 3/25/15.</p> <p>At the hearing on 3/19/15, the Court set a status hearing for 8/12/15 for the filing of the Inventory and Appraisal.</p> <p>Minute Order 8/12/15 states: Sandra Brown represents to the Court that she has made numerous attempts to phone Mr. Farmer and has gone to his office, but has been unable to make contact. The Court issues an Order to Show Cause to C. Michael Farmer as to why he should not be sanctioned for his failure to appear today. Mr. Farmer is ordered to be personally present in court on 9/9/15. The Court admonishes Ms. Brown to not make any payments or distributions without the Court's order.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Inventory and Appraisal pursuant to Probate Code §8900 or written status report pursuant to Local Rule 7.5.</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: 9/3/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 17 – Robinson</p>

Petition for Appointment of Guardian of the Person (Prob. Code §1510)

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:	
	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			X
	Clearances			X
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 9/3/15	
			Updates:	
			Recommendation:	
			File 21 – Boudreau	

DOD: 6/24/15	DEAN W. ALLEN , Named Executor without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: Note: The Court will set status hearings as follows: <ul style="list-style-type: none"> • Wednesday, February 10, 2016 for filing the Inventory and Appraisal • Wednesday, November 16, 2016 for filing the first account or petition for final distribution If the proper items are on file pursuant to Local Rule 7.5, the status hearings may come off calendar.
	Full IAEA – ok	
	Will dated 8/14/13	
<input type="checkbox"/> Aff.Sub.Wit.	Residence: Fresno	
<input checked="" type="checkbox"/> Verified	Publication: Business Journal	
<input checked="" type="checkbox"/> Inventory	Estimated value of estate:	
<input checked="" type="checkbox"/> PTC	Personal property: \$660,000.00	
<input checked="" type="checkbox"/> Not.Cred.	Annual income: \$13,200.00	
<input checked="" type="checkbox"/> Notice of Hrg	Total: \$673,200.00	
<input checked="" type="checkbox"/> Aff.Mail	Probate Referee: Steven Diebert	
<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		
<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: skc
		Reviewed on: 9/3/15
		Updates:
		Recommendation: SUBMITTED
		File 23 – Wilson