



## 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.

Attorney Poochigian, Mark S. (for Petitioner Ann L. Kromberg, Administrator)

Attorney Krause, Stefanie J. (for Ruth P. Lind, former Attorney for Administrator Ann Kromberg)

**First and Final Report of Personal Representative, Petition for Termination of Decedent's Estate and Allowance of Attorneys' Fees on Waiver of Accounting**

<b>DOD: 6/10/1991</b>		<p><b>ANN L. KROMBERG</b>, daughter and Administrator, is Petitioner.</p> <p>Accounting is waived.</p> <p>I &amp; A — <b>\$375,000.00</b>                  POH — <b>\$0.00</b></p> <p>Administrator — <b>waives</b></p> <p>Attorney (BMJ) — <b>\$8,400.00</b>  <i>(80% of total \$10,500.00 statutory fee requested to be paid to Baker Manock &amp; Jenson;)</i></p> <p><b>Note:</b> Declaration of Ruth Lind filed 6/22/2015 states she represented the Administrator during a substantial part of the probate matter, up to and including the preparation in its entirety of the Inventory and Appraisal, and she requests <b>80%</b> of the statutory fee in the sum of <b>\$8,400.00</b>.</p> <p>Costs (filing fee) — <b>\$435.00</b></p> <p><b>~Please see additional page~</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Page 1B</b> is the <i>Petition for Allowance of Ordinary and Extraordinary Fees to Attorney Ruth P. Lind.</i></p> <p><b>Page 1C</b> is the Status Hearing Re Resolution.</p> <p><b>Continued from 8/11/2015.</b> Minute Order states parties have reached resolution in principle, it just needs to be reduced to writing.</p> <p><b>The following issues from the last hearing remain:</b></p> <ol style="list-style-type: none"> <li>1. Petitioner distributed the estate real property without Court order in violation of Probate Code § 10501(a)(4). Court may require Petitioner to procure a deed of rescission for the real property from Decedent's spouse, <b>MARLENE KROMBERG</b>, as suggested by Petitioner.</li> <li>2. <i>Petition</i> states there are no assets remaining in the estate for distribution, as Petitioner distributed the sole estate asset to the Decedent's spouse. <i>Petition</i> does not but should address the source of payment for the requested attorney fees and reimbursement of costs.</li> <li>3. Need proposed order.</li> </ol>
<b>Cont. from 071415, 081115</b>			
<input type="checkbox"/> Aff.Sub.Wit.			
<input 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			
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<input type="checkbox"/> Aff.Pub.			
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<input checked="" type="checkbox"/> 9202			
<input type="checkbox"/> Order	X		
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
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<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice	N/A		
		<p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 9/9/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 1A - Kromberg</b></p>	

**Petitioner states:**

**Character of Estate and Advance Distribution:**

- The estate consists solely of real property, which the Decedent received as a gift from his parents on approximately 2/14/1949;
- Pursuant to that certain Declaration of Land Patent recorded on 9/13/1985, Decedent and **MARLENE KROMBERG**, spouse, severally certified and declared [*in sum, that the real property is patented and thereby a perfect fee simple title is held in their names*]; (*copy of Land Patent attached as Exhibit A*);
- Pursuant to the Land Patent, the real property that has been inventoried as an asset of this Decedent's estate was declared as of 9/13/1985 to be owned jointly by Decedent James M. Kromberg and Marlene Kromberg;
- Even in the absence of the Land Patent, the Decedent was married to Marlene Kromberg in 1953, and at all times during the marriage, including for many years prior to 1985 (the time which California first required transmutations to be in writing), the Decedent treated the real property as the community property of himself and Marlene Kromberg; the property was improved and farmed using community property, the Decedent and his wife Marlene Kromberg personally farmed the property, the proceeds from such property were treated as community property; thus, it appears to the Petitioner that such real property was the community property of the Decedent and Marlene Kromberg;
- The estate is in a condition to be closed; the estate administration was prolonged due to multiple factors, including that the Decedent's conservatorship case prior to his death (0420590) was not closed until 1998 [*Decedent's DOD 6/10/1991*];
- Petitioner, in attempting to complete the administration of the estate without incurring unnecessary attorney's fees, consulted with a paralegal service regarding completion of administration; based on that consultation, Petitioner incorrectly understood that as personal representative she was authorized to make distributions from the Decedent's estate after giving notice of the proposed action to interested persons;
- Petitioner distributed the Decedent's real property to Decedent's surviving spouse, Marlene Kromberg on 2/13/2015 after obtaining consents from the other heirs of the Decedent (*copy of recorded Deed to real property attached as Exhibit B*);
- If required by the Court, Petitioner will request that her mother [Marlene Kromberg] execute a deed of rescission, conveying the subject real property back to the estate of the Decedent, as Petitioner does not anticipate any problem obtaining such deed from her mother is required;
- There are no assets remaining in the estate for distribution, as Petitioner distributed the sole estate asset to the Decedent's spouse.

**~Please see additional page~**

**Petitioner states, continued:****Representation and Attorney's Fees:**

- Attorney Ruth P. Lind was counsel of record for Petitioner in this matter from its inception in 1991 until 2/10/2015; (Petitioner consulted with but did not retain Baker Manock & Jensen in 2012, and Attorney Poochigian advised Ms. Lind in February 2012 that he had not been retained);
- Petitioner was [self-represented] from 2/10/2015 until 4/9/2015, when Attorney Poochigian began representing her until the present;
- Ruth Lind has, through counsel, corresponded with Petitioner regarding the amount of fees claimed to be owed to Ms. Lin (*copy of billing statement sent to Petitioner's counsel on 5/12/2015 attached as Exhibit C*);
- Ms. Lind requests **80%** of the statutory fee (**\$8,400.00**), in addition to costs (**\$334.50**) and extraordinary fees for a total fee request of **\$28,467.50**;
- Petitioner objects to the fees requested by Ms. Lind, and is hopeful that good-faith attempts to resolve her dispute with Ms. Lind will result in their agreeing on a mutually acceptable amount of attorney's fees that should be paid to Ms. Lind and that such agreement may be reached prior to the hearing on the instant petition;
- As of the filing of this Petition, Baker Manock & Jensen has rendered ordinary and extraordinary services to the Petitioner, and requests that **80%** of the statutory fee be apportioned to it, and that additional fees for extraordinary services to the personal representative be awarded to Baker Manock & Jensen in an amount not to exceed **\$10,000.00**, based on appropriate substantiation.

**Petitioner requests this Court order that:**

1. Administration of the estate be closed without an accounting;
2. All acts and proceedings of Petitioner as personal representative be confirmed and approved;
3. Petitioner be authorized and directed to pay Petitioner's attorney Baker Manock & Jensen the sum of **\$8,400.00** as fees for ordinary services to Petitioner, **\$435.00** for costs advanced to the estate, and fees for extraordinary services to the personal representative in an amount not to exceed **\$10,000.00**, based on appropriate substantiation; and
4. Distribution of the estate in Petitioner's hands [*there are no assets remaining in the estate for distribution*], and any other property of Decedent or estate not now known or discovered be made to the persons entitled to it.

Attorney Poochigian, Mark S. (for Petitioner Ann L. Kromberg, Administrator)  
 Attorney Krause, Stefanie J. (for Ruth P. Lind, former Attorney for Administrator Ann Kromberg)

Petition for Allowance of Ordinary and Extraordinary Fees to Attorney Ruth P. Lind

DOD: 6/10/1991		<p><b>RUTH P. LIND</b>, former Attorney for Administrator Ann Kromberg, is Petitioner.</p> <p><b>Petitioner states:</b></p> <ul style="list-style-type: none"> <li>Ann Kromberg retained Attorney Ruth Lind for assistance in administering the Estate of James Kromberg; Ms. Lind rendered legal services necessary in the administration of the estate from the start of the probate until 2/10/2015;</li> <li>Ann Kromberg has filed an inventory and appraisal showing the value of the estate to be <b>\$375,000.00</b>;</li> <li>Although Ms. Lind was unable to complete the probate of this action due to a Substitution of Attorney, Ms. Lind did the majority of the work on the probate;</li> <li>The only remaining item to be complete when Ms. Lind substituted out was preparation of the Petition for Final Distribution and Accounting, which the Administrator indicates will be waived;</li> <li>Therefore, Ms. Lind requests <b>80%</b> of the <b>\$10,500.00</b> statutory fee; Ms. Lind requests <b>\$8,400.00</b> of that fee;</li> <li>Additionally, Ms. Lind has performed extraordinary legal services in the administration of the estate; the activities, amount of time devoted to each, and the costs are detailed in the <i>Declaration of Ruth P. Lind [filed 6/22/2015]</i>;</li> <li>Ms. Lind should be allowed reasonable compensation for these services, which is <b>\$19,833.00</b>, and which has not been paid;</li> <li>Ms. Lind also incurred costs in the administration of the estate, itemized in the <i>Declaration of Ruth P. Lind [filed 6/22/2015]</i>; Ms. Lind should be allowed reimbursement of those costs in the amount of <b>\$334.50</b>;</li> </ul> <p align="center"><b>~Please see additional page~</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 8/11/2015.</b>  <i>Minute Order</i> states parties have reached resolution in principle, it just needs to be reduced to writing.</p>	
Cont. from 081115				
<input type="checkbox"/>	Aff.Sub.Wit.			
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<input type="checkbox"/>	Letters			
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<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
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<input type="checkbox"/>	Status Rpt			
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<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 9/9/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b>                  File 1B - Kromberg</p>		

**Petitioner states, continued:**

- There is good cause to grant this Petition prior to the final distribution of the estate; there have been continued delays by Ann L. Kromberg to finalize the estate, which may continue considering the Petition relies on pending waivers of the accounting;
- Furthermore, waiting until the conclusion of the probate will result in hardship on Ms. Lind, as further set forth in her Declaration in support of this Petition.

**Petitioner prays the Court make its Order as follows:** Ann L. Kromberg, the Administrator of the Estate, be authorized and directed to pay Ruth P. Lind **\$8,400.00** from estate funds as the unpaid balance of compensation for ordinary services to the estate, **\$19,733.00** as the unpaid balance of extraordinary services to the estate as specified, and **\$334.50** as reimbursement for costs incurred by Ruth P. Lind as specified for a total of **\$28,467.50**.

**Declaration of Ruth P. Lind in Support of Petition filed 6/22/2015** describes the extraordinary legal services rendered and includes dated itemizations from 6/10/1991 to 8/18/2006, for **139.95 hours** resulting in a fee of **\$19,733.00**, calculated at rates of **\$125.00/hour in 1991, \$135.00/hour in 1992, \$150.00/hour in 1993, \$175.00/hour in 1995, and \$200.00/hour in 2002** and for the remainder of the work on this probate.

**Declarant states:**

- She represented the Administrator Ann L. Kromberg from the start of the probate proceeding until 2/10/2015;
- She also represented the Administrator in other matters that were filed in Fresno County Superior Court [please refer to Page 1 for list of 4 separate cases, which have all been completed]; payment was authorized by Court order for all of those matters, and the fees and costs sought in this *Petition* were not billed for or paid in those matters;
- The probate is still continuing in this matter, although she is no longer the attorney of record in this proceeding;
- Because she represented the Administrator during a substantial part of the probate, completed all work except for the filing of the Inventory and Appraisal which she prepared in its entirety, and the Petition for Final Distribution, she requests **80%** of the statutory fee of **\$10,500.00**, amounting to **\$8,400.00**;
- There were bankruptcy cases involving some estate properties and interest, and she provided extraordinary services in corresponding and conferencing with Administrator and various attorneys involved with the bankruptcy cases, and title company officer, including arranging for appointment of special administrator; as a result, the Public Administrator was appointed and the properties in question were protected;
- She provided extraordinary services in obtaining records and assets from William Kromberg, needed to enable the Administrator to marshal the Decedent's assets; as a result of her actions, the Administrator was able to stop attempts of William Kromberg and his son to move assets;
- The **\$8,400.00** in statutory fees and **\$19,733.00** in extraordinary fees is reasonable compensation for the legal services itemized and attached as *Exhibit A* to the Declaration;
- She has not received payment for any of her services on this case; she received payment for services provided in other matters in which she represented the Administrator [Ann L. Kromberg]; however, the items listed in *Exhibit A* are not duplicates of previously paid fees or costs;
- She advanced costs itemized on *Exhibit A* [for certified copies, filing fees, publication, archive retrieval fee], and requests reimbursement of the **\$334.50** costs;
- There is good cause for allowance of compensation at this time; she was required to devote substantial time to providing legal services on this case;
- She is a sole practitioner and her normal income diminished accordingly, causing hardship to her.

Attorney Poochigian, Mark S. (for Petitioner Ann L. Kromberg, Administrator)  
 Attorney Krause, Stefanie J. (for Ruth P. Lind, former Attorney for Administrator Ann Kromberg)

Probate Status Hearing Re: Resolution

DOD: 6/10/1991	<p><b>ANN L. KROMBERG</b>, daughter and Administrator, filed a <i>First and Final Report of Personal Representative, Petition for Termination of Decedent's Estate and Allowance of Attorneys' Fees on Waiver of Accounting</i> on 6/9/2015.</p> <p><b>RUTH P. LIND</b>, former Attorney for Administrator Ann Kromberg, filed a <i>Petition for Allowance of Ordinary and Extraordinary Fees to Attorney Ruth P. Lind</i> on 6/22/2015.</p> <p><b>Minute Order dated 8/11/2015</b> from the hearing on the above-referenced petitions set this status hearing on 9/15/2015 regarding the resolution and its reduction to writing.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
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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: 9/9/15
		Updates:
		Recommendation:
		File 1C – Kromberg

<b>DOD: 7/27/05</b>	<p><b>PUBLIC ADMINISTRATOR</b> was appointed Successor Administrator on 1/20/15. Letters issued 2/5/15.</p> <p><b>History: JEFFREY MCCLAY</b>, Son, was appointed Administrator with Full IAEA with bond of \$252,000.00 on 5/23/06. Bond was filed and Letters issued 8/31/06. I&amp;A filed 2/7/07 indicated residential real property valued at \$300,000.00.</p> <p>On 5/10/07, a Request for Special Notice was filed by Probate Referee Steven Diebert. On 10/12/07, a Creditor's Claim of \$1,105.65 was filed by Cancer Care Associates of Fresno. There was no further activity in the estate the Court set the matter for status hearing in 2013.</p> <p>On 9/10/14, Attorney Alexander filed a petition for final distribution on behalf of his absconded client pursuant to Probate Code §10953(c). The petition indicated that the Administrator borrowed a sum of money to satisfy obligations and expenses of the estate, secured by the real property, and intended to make a distribution to his sister, make necessary repairs, and assume the loan after closing. The attorney was unaware whether any distribution of loan proceeds was made, whether any payment to the sister was made, or whether any repairs were made on the residence. The attorney requested surcharge of the Administrator to the extent of any breach of fiduciary duty, etc., and also requested statutory and extraordinary attorney's compensation.</p> <p><b>Minute Order 1/20/15 states:</b> The Court removes Jeffrey McClay and appoints the Public Administrator in order for them to pursue surcharging Mr. McClay on the bond. Tracy Stevenson requests time to have subpoenas issued and gather information. The Public Administrator is to submit a written status report for the 4/21/15 hearing.</p> <p><b>Status Report Re Estate Assets filed 4/14/15 by Public Administrator states</b> Deputy PA Noe Jimenez spoke with Mr. Alexander, who believed that the only asset, the residence, was lost to foreclosure. He later found out that Mr. McClay may have benefitted from a loan he secured against the residence – a line of credit for \$120,000.00 on the house in 2007. It appears he pulled all the credit line money out, and the residence was sold at a trustee sale in 2010 for \$155,000.00. Mr. Jimenez believes he has found an accurate address for Mr. McClay in Sacramento, CA. The PA and counsel agree that Mr. McClay should be surcharged the full amount of the property listed on the I&amp;A, \$252,100 of which should be paid by the bond company, less any amounts that the company can recover or show were paid to benefit the estate.</p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont from 042115, 060915, 081815</b>		<b>Minute Order 8/18/15: Ms. Kruthers requests 30 days to look into counsel who can address the bankruptcy issue that has been raised.</b>
<b>Aff.Sub.Wit.</b>		<b>Note: The above minute order appears to refer to the Declaration filed 6/5/15 by Tracy A. Stevenson, Attorney for Surety, American Contractors Indemnity Company. See Page 2.</b>
<b>Verified</b>		<b>As of 9/10/15, nothing further has been filed.</b>
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		<b>Reviewed by: skc</b>
<b>Citation</b>		<b>Reviewed on: 9/10/15</b>
<b>FTB Notice</b>		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 2 - McClay</b>

**Declaration of Tracy A. Stevenson Regarding Discharge of Surety's Liability Upon Bankruptcy of Personal Representative filed 6/5/15 states:** Jeffrey M. McClay, the decedent's son, was appointed administrator of the decedent's estate on or about 5/23/06. ACIC filed its administrator's bond on behalf of Jeffrey M. McClay in the penal sum of \$252,100 on or about 8/31/06. In applying for that bond, McClay executed an indemnity agreement wherein he agreed to indemnify and reimburse the surety for all losses, attorney fee, and costs of any nature resulting from issuance of the bond.

On or about 7/8/08, while still acting as administrator of the estate, Jeffrey M. McClay filed a Voluntary Petition for Bankruptcy in the Eastern District of California, Case Number 2008-14472. That petition disclosed that he was administrator of the estate and as such held titled to the decedent's real property, subject to an encumbrance, and that he was an heir of the estate.

Because he was administrator at the time he filed for bankruptcy protection, the estate is charged with having knowledge of the bankruptcy filing and will failing to take action to seek relief from the bankruptcy court to protect its interests or pursue a claim. As such the estate's claim against McClay has been discharged by the bankruptcy court and the estate is barred from pursuing surcharge against him.

Because a claimant is required by law to obtain a surcharge judgment against a fiduciary before the surety's liability arises, the estate is legally precluded from proceeding against the surety in this matter.

Because McClay is bound by an indemnity agreement to indemnify the surety for all losses and fees and costs in connection with the bond, pursuing the surety would cause post-discharge economic loss to McClay and interfere with the fresh start granted by his bankruptcy discharge. (The surety did not receive notice of the bankruptcy action and the bankruptcy discharge does not preclude the surety from seeking indemnity from McClay, which it would do.)

See authority provided.

The declaration concludes that the estate's ability to pursue surcharge against Jeffrey McClay has been discharged by the bankruptcy court, and the estate's ability to pursue the surety on its bond is also discharged for two reasons: 1) a surcharge against McClay is a prerequisite to pursuing the surety, and a surcharge cannot be sought; and 2) pursuit of the surety would violate the fresh start objective of the Bankruptcy Code.

**First Account Current and Report of Successor Conservator of the Estate and Petition for its Settlement; for Allowance of Fees to the Conservator of Estate and his Attorney.**

	<b>BRUCE BICKEL</b> , Successor Conservator of the estate, is petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>Notice of Hearing indicates that Donald Lewis McDaniel is the petitioner when in fact Bruce Bickel as conservator of the estate is petitioner.</li> <li>Disbursement schedule shows payments for auto registrations on a 1965 Chevy totaling \$253.00 however there is no 1965 Chevy listed on the property on hand. Need clarification.</li> <li>Order appointing Bruce Bickel as Conservator ordered all securities placed into a blocked account. There is no indication in the file that the account is in fact blocked.</li> <li>Bank statement for the RBC Wealth Management account shows the value of the account was \$489,386.74 as of 12/31/14. The statement indicates the assets are FDIC insured up to \$250,000.</li> <li>Based on the property on hand, receipts and cost of recovery, bond should be increased to \$317,000.00</li> <li>Need Order.</li> </ol> <p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 9/10/15</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 3 – McDaniels</b></p>
	<b>ROBERT N. LOWDER, III</b> and <b>MARCIA LOWDER</b> are Successor Co-Conservators of the person.	
<b>Cont. from</b>	Account period: 10/12/13 – 12/31/14	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Accounting - <b>\$967,789.52</b>	
<input checked="" type="checkbox"/> <b>Verified</b>	Beginning POH - <b>\$742,043.92</b>	
<input type="checkbox"/> <b>Inventory</b>	Ending POH - <b>\$734,880.85</b>	
<input type="checkbox"/> <b>PTC</b>	Current bond: \$280,000.00	
<input type="checkbox"/> <b>Not.Cred.</b>	Attorney - <b>\$2,707.50</b>	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	(\$1,250.00 per Local Rule for preparation of the accounting plus 1.5 hrs @275/hr. to update conservatee's estate plan and 4.1 hrs. @ \$250-\$275 for care of conservatee)	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	Attorney costs - <b>\$435.00</b> (filing fee)	
<input type="checkbox"/> <b>Aff.Pub.</b>	Conservator - <b>\$27,577.07</b>	
<input type="checkbox"/> <b>Sp.Ntc.</b>	(224.68 hrs. @ \$60-\$150/hr., already received \$10,078.50 per order allowing payment of \$600 per month leaving a balance due of \$17,498.57)	
<input type="checkbox"/> <b>Pers.Serv.</b>	<b>Petitioner prays for an Order:</b>	
<input type="checkbox"/> <b>Conf. Screen</b>	<ol style="list-style-type: none"> <li>Approving, allowing and settling the first account;</li> <li>Confirming, approving and ratifying all acts and transactions of Petitioner as conservator of the estate;</li> <li>Approving fiduciary commissions and attorney fees and costs.</li> </ol>	
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
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<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		

**Note:** If the petition is granted, a status hearing will be set as follows:

- **Wednesday, March 1, 2017** at 9:00 a.m. in Department 303, for the filing of the second account.

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.

**Third Account Current and Report of Successor Conservator and Petition for Allowance of Compensation to Successor Conservator and Attorney and Dispensation of Further Accounts**

		<b>PUBLIC GUARDIAN, Conservator, is petitioner.</b>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Petition requests the court dispense with further accountings however, the request is not included in the pray or in the proposed order.</p> <p><b>Note:</b> If the Court does not dispense with further accountings a status hearings will be set as follows:</p> <ul style="list-style-type: none"> <li><b>Wednesday, August 30, 2017</b> at 9:00 a.m. in Department 303, for the filing of the fourth account.</li> </ul> <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>
		Account period: 6/18/13 – 6/17/15	
<b>Cont. from</b>		Accounting - <b>\$40,077.15</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Beginning POH - <b>\$ 3,927.13</b>	
<input checked="" type="checkbox"/>	<b>Verified</b>	Ending POH - <b>\$ 2,174.70</b>	
<input type="checkbox"/>	<b>Inventory</b>	Conservator - <b>\$1,169.52</b>	
<input type="checkbox"/>	<b>PTC</b>	(3.87 Deputy hours @ \$96/hr and 10.50 Staff hours @ \$76/hr)	
<input type="checkbox"/>	<b>Not.Cred.</b>	Attorney - <b>\$1,250.00</b> (less than allowed per Local Rule)	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Bond fee - <b>\$50.00</b> (o.k.)	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	Petitioner states that the conservatorship estates meets the requirements of Probate Code § 2628(b) to dispenses with further accountings. Petitioner requests that the court dispense with further accountings as long as conservatorship estate continues the requirements of Probate Code §2628(b).	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input checked="" type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>	<b>Petitioner prays for an Order:</b>	
<input type="checkbox"/>	<b>9202</b>	1. Approving, allowing and settling the third account;	
<input checked="" type="checkbox"/>	<b>Order</b>	2. Authorizing the conservator and attorney fees and commissions;	
<input type="checkbox"/>	<b>Aff. Posting</b>	3. Payment of the bond fee.	
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		

<b>Reviewed by:</b> KT
<b>Reviewed on:</b> 9/9/15
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 4 – Wooten</b>

**5 Michael John Collins (CONS/PE) Case No. 09CEPR00983**

Conservator Collins, Tim (pro per – father/Petitioner)

**Fifth Account and Report of Conservator and Petition for its Settlement**

<b>Age: 23 years</b>	<b>TIM COLLINS</b> , conservator, is petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>CONTINUED FROM 07/28/15</b></p> <p>1. Receipts include the conservatee's wages totaling \$1,203.00. Probate Code §2601 states that wages are not part of the conservatorship. Wages shall be paid to the conservatee and are subject to his or her control to the same extent as if a conservatorship did not exist.</p> <p>2. The Conservator has been allowed a monthly fee of \$500 since 03/21/13. At that time Michael lived with the conservator. Michael now lives independently in his own condo with a roommate who is not paying rent due to his performing daily services for the conservatee. The Court may require more information about the appropriateness /necessity of continuing the \$500/mo. fee to the conservator given the changed circumstances.</p> <p><b>Note:</b> If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> <li>• <b>Wednesday, June 8, 2016</b> at 9:00 a.m. in Department 303, for the filing of the Sixth account.</li> </ul> <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>
	Account period: <b>4/24/14 – 4/23/15</b>	
	Accounting - <b>\$148,355.42</b>	
	Beginning POH- <b>\$131,484.99</b>	
	Ending POH - <b>\$129,453.19</b> (\$5,620.75 is cash)	
<b>Cont. from 072815</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Current bond: <b>\$61,000.00</b>	
<input checked="" type="checkbox"/> <b>Verified</b>	Conservator - Allowed \$500.00 per month per court order dated 3/21/13.	
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>	<b>Petitioner prays for an order:</b>	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	1. Settling and allowing the fifth account and report;	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> w/	2. Approving and confirming the acts of the petitioner as Conservator of the person and estate of Michael Collins.	
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>	<b>Court Investigator Samantha Henson filed a report on 02/09/15.</b>	
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>	<b>Declaration of Timothy Collins</b> filed 08/17/15 states: Michael's roommate is Jared Martin. The conservatee and his family have known Jared for many years through their church. Jared is not charged rent to live with Michael at his condo because he performs many tasks that are necessary for Michael to be able to live independently including ensuring Michael takes his medications every day as prescribed, assisting with Michael's hygiene, keeping the condo neat and clean, preparing meals and helping with laundry. The only other option would be for Michael to live with strangers at a group home, which would be very costly and could be confusing for Michael. Further, it is not easy living with an autistic person, and Jared deals with Michael's pacing and constant asking of repetitive questions. A roommate who performs all of these tasks and endures this situation would not be willing to pay \$500 - \$600/month in rent, they could easily go somewhere else and rent a room for that amount. For these reasons, Petitioner believes it is in Michael's best interest to allow Jared to continue to live in the condo rent free.	
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input checked="" type="checkbox"/> <b>2620(c)</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
	<b>Reviewed by:</b> JF	
	<b>Reviewed on:</b> 09/10/15	
	<b>Updates:</b>	
	<b>Recommendation:</b>	
	<b>File 5 – Collins</b>	

<b>DOD: 06/24/10</b>	<p><b>ROGER ROWELL</b> and <b>DAVID E. ROWELL</b>, were appointed as Co-Administrators with Full IAEA without bond on 02/17/11. Letters were issued on 02/17/11.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><u>CONTINUED FROM 08/18/15</u></b></p> <p>1. Need Order closing the estate.</p>
<b>Cont. from 081815</b>	<p>On 10/21/11, <b>David E. Rowell</b> resigned as Co-Administrator. New Letters were issued to <b>Roger Rowell</b> as the sole Administrator on 11/01/11.</p>	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>	<p><b>Inventory &amp; Appraisal</b> filed 11/29/11 shows an estate value of \$289,000.00 (1/7<sup>th</sup> of a 40% interest in real property).</p>	
<b>Notice of Hrg</b>	<p>On 02/08/13, the Court removed Roger Rowell and appointed the Public Administrator as Successor Administrator.</p>	
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>	<p>Numerous Status Hearings have been heard since 2013.</p>	
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>	<p><b>Closing Status Report of Public Administrator and Request that Estate be Closed and Request for Discharge</b> filed 09/09/15 states:</p>	
<b>Letters</b>	<p>The Public Administrator has been unable to contact former Administrator, Roger Rowell. An Inventory &amp; Appraisal was filed by Roger Rowell on 11/29/11 indicating that the only asset of the estate is a 1/7 interest in a 40% interest of real property in Fresno County identified as APN: 425-092-30. Reportedly, the other 6/7 of the 40% interest was put into a trust, but the Public Administrator does not have that trust or any knowledge of it.</p>	
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>	<p>The Public Administrator asserts that she can do nothing more to help close the estate and requests that she be discharged as successor administrator and that the estate be closed.</p>	
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<p><b>Reviewed by:</b> JF</p>
		<p><b>Reviewed on:</b> 09/10/15</p>
		<p><b>Updates:</b></p>
		<p><b>Recommendation:</b></p>
		<p><b>File 6 – Rowell</b></p>

First and Final Account and Report of Executor and Petition for Its Settlement, for Allowance of Attorneys' Fees, and for Final Distribution

DOD: 7/29/2010		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p style="text-align: center;"><b>OFF CALENDAR</b></p> <p style="text-align: center;">Order on First and Final Report filed 9/3/2015.</p>	
Cont. from 070815, 081915			
	Aff.Sub.Wit.		
✓	Verified		
✓	Inventory		
✓	PTC		
✓	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail		W/O
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		050113
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice	Sp. Not. W/drawn	
		Reviewed by: LEG	
		Reviewed on: 9/3/15	
		Updates:	
		Recommendation:	
		File 7 - Hine	

**8 Cain Blanco, Trinity Blanco and Vanity Blanco (GUARD/P)**

**Case No. 11CEPR00659**

Petitioner: Oriana S. Blanco (pro per)  
Guardian: Rosemary Blanco (pro per)

**Petition for Termination of Guardianship**

		<p><b>ORIANA S. BLANCO</b>, mother, is petitioner.</p> <p>Please see petition for details.</p> <p>Court Investigator Report filed 8/11/15.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><u>Continued to 10/20/15</u></b> at the request of the petitioner.</p> <ol style="list-style-type: none"> <li>1. Need Notice of Hearing.</li> <li>2. Need proof of service of the Notice of Hearing on:                             <ol style="list-style-type: none"> <li>a. Rosemary Blanco (guardian)</li> <li>b. Anthony Blanco (father)</li> <li>c. Cain Blanco (minor)</li> <li>d. Trinity Blanco (minor)</li> <li>e. Jesse Blanco (paternal grandfather)</li> <li>f. Joe Rodriguez (maternal grandfather)</li> <li>g. Grace Amerino (maternal grandmother)</li> </ol> </li> </ol>																																																																				
<p><b>Cont. from 081815</b></p> <table border="1"> <tr><td></td><td>Aff.Sub.Wit.</td><td></td></tr> <tr><td>✓</td><td>Verified</td><td></td></tr> <tr><td></td><td>Inventory</td><td></td></tr> <tr><td></td><td>PTC</td><td></td></tr> <tr><td></td><td>Not.Cred.</td><td></td></tr> <tr><td></td><td>Notice of Hrg</td><td>X</td></tr> <tr><td></td><td>Aff.Mail</td><td>X</td></tr> <tr><td></td><td>Aff.Pub.</td><td></td></tr> <tr><td></td><td>Sp.Ntc.</td><td></td></tr> <tr><td></td><td>Pers.Serv.</td><td></td></tr> <tr><td></td><td>Conf. Screen</td><td></td></tr> <tr><td></td><td>Letters</td><td></td></tr> <tr><td></td><td>Duties/Supp</td><td></td></tr> <tr><td></td><td>Objections</td><td></td></tr> <tr><td></td><td>Video Receipt</td><td></td></tr> <tr><td></td><td>CI Report</td><td></td></tr> <tr><td></td><td>9202</td><td></td></tr> <tr><td>✓</td><td>Order</td><td></td></tr> <tr><td></td><td>Aff. Posting</td><td></td></tr> <tr><td></td><td>Status Rpt</td><td></td></tr> <tr><td></td><td>UCCJEA</td><td></td></tr> <tr><td></td><td>Citation</td><td></td></tr> <tr><td></td><td>FTB Notice</td><td></td></tr> </table>					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
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	UCCJEA																																																																						
	Citation																																																																						
	FTB Notice																																																																						

Attorney Bell, Melinda (for Petitioner Jana Keeley, mother)  
 Petition for Appointment of Guardian of the Estate

	<b>NO TEMPORARY REQUESTED</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>JANA KEELEY</b> , mother, is Petitioner and requests appointment as Guardian of the Estate without bond with deposits of into a blocked account.	<b>Notes:</b>
<b>Cont. from</b>		<ul style="list-style-type: none"> <li>• <b>Petition for Order to Dispose of Minor's Money was filed by Petitioner in Case Number <u>15CEPR00062</u> on 1/16/2015</b>, seeking an order to deposit into a blocked account the same funds which are the subject of the instant petition for guardianship of the estate.</li> <li>• <b>Minute Order dated 4/8/2015</b> from the hearing on the <i>Petition for Order to Dispose of Minor's Money</i> denies and dismisses the petition, and states: The Court finds that a Guardianship of the Estate is required and indicates the intention to grant it. Counsel requests that the new petition be filed into this same case [15CEPR00062], and she is directed to inquire with the Clerk's office.</li> <li>• <b>Letters of Temporary Guardianship of the Person issued on 4/26/2012</b> to <b>DIANA KATIGBAK</b>, paternal aunt, and <b>RICHARD VAGER</b>, uncle; the temporary guardianship remained for the duration of Court Trial and mediation; <i>Letters</i> expired on <b>8/23/2013</b> and were not extended.</li> <li>• <b>Order After [Court Trial] Hearing dated 9/30/2013 [Judge Oliver]</b> finds in most pertinent part that all parties have agreed that the guardianship shall be terminated.                  ~Please see additional page~</li> </ul>
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order	w/ blocking 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		
		<b>Reviewed by:</b> LEG
		<b>Reviewed on:</b> 9/10/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 9 – Katigbak</b>

**Petitioner requests** additional orders for payment for legal services rendered to the estate of the minor, such that the Court order that the estate shall pay to Attorney Melinda Bell the sum of **\$5,217.50**, and payment of reimbursement of costs advanced by Melinda Bell for filing fees, attorney service fees, Courtcall fees, and postage fees in the amount of **\$1,157.33** (*Declaration in Support of Fee Request filed 8/5/2015.*)

**Notes Re Attorney Fee Request in Declaration of Melinda S. Bell in Support of Fee Request filed 8/5/2015:**

- *Declaration* includes charges of **\$3,502.50** for **9.95** hours of services rendered at **\$350.00** per hour, stating that the **9.95** hours includes work in connection with the [*Petition for Order to Dispose of Minor's Money* filed on 1/16/2015 in Case 15CEPR00062], the points and authorities in support, as well as all documents in connection with establishment of a Guardianship of the Estate, all for the benefit of Aiyanna Katigbak.
- *Declaration* includes charges for anticipated time to complete this matter, consisting of **4.9** hours at **\$350.00** per hour for emailing, filing fees check and documents, reviewing and responding to probate notes, preparing and serving notice of hearing, preparing for and attending hearing, etc., for a total of **\$1,715.00**.
- *Declaration* includes request for reimbursement of costs advanced (costs are not itemized by date), some of which are non-reimbursable costs pursuant to Local Rule 7.17(B), as follows: **\$202.00** for CourtCall appearances (Local Rule 7.17(B)(5); **\$35.00** for Attorney Service Fees (Local Rule 7.17(B)(7); and **\$17.50** for email to probate examiner (Local Rule 7.17(B)(6)), for a total of **\$254.50** in non-reimbursable costs.
- Local Rule 7.16(B)(1) provides the Court will allow a flat fee of **\$2,500.00** without itemization for attorney services for the establishment of a guardianship and preparation of the first account, payable upon settling the account.

**Note Re Future Hearings:** If *Petition* is granted, the Court will set the following status hearings:

- **Thursday, October 15, 2015 at 9:00 a.m. in Dept. 303** for filing receipt of funds in blocked account;
- **Thursday, February 18, 2016 at 9:00 a.m. in Dept. 303** for the filing of the final inventory and appraisal; and
- **Thursday, November 17, 2016 at 9:00 a.m. in Dept. 303** for the filing of the first account of the guardianship estate.

Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.

**10 Morgan Elizabeth Pasley (CONS/PE) Case No. 12CEPR00938**

Attorney Erlach, Mara M. (for Debra Pasley – Conservator – Petitioner)

**Second Amended Account Current and Report of Conservator; Petition of Conservator  
Petition for its Settlement, for Allowance of Attorneys Compensation and for its Termination**

		<p><b>DEBRA PASLEY</b>, Mother and Conservator of the Person and Estate with bond of \$15,000.00, is Petitioner. <i>(Not verified.)</i></p> <p><b>Account period: 3/28/13 – 10/17/14</b>  <b>Accounting: <u>Not provided</u></b>                  Beginning POH: \$13,438.31                  Ending POH: \$70,195.61                  (\$1,715.61 plus a 1/5 interest in real property in Virginia valued at \$68,480.00)</p> <p><b>Petitioner states:</b> Inventory and Appraisal was filed 6/5/13 showing the value of the estate to be \$13,438.31. Summary of account and supporting schedules are provided at Exhibit B. (See #1.)</p> <p>As reflected in prior pleadings, the Conservator and Conservatee moved out of state. The Conservator was appointed Guardian of the Conservatee in Oklahoma by Court order and Letters issued on 8/13/14.</p> <p>Petitioner does not request compensation for her services.</p> <p>Petitioner requests attorney's compensation as set forth in Exhibit "C." (See #3.)</p> <p><b>Petitioner prays:</b></p> <ol style="list-style-type: none"> <li>1. That this account and report be approved and settled;</li> <li>2. That the acts of the Conservator shown in the account and report be approved;</li> <li>3. That, upon settlement of this account, the Conservator be directed to pay her attorneys, McCormick Barstow, LLP, compensation for services rendered and, as yet, unpaid;</li> <li>4. That the Conservatorship in California be terminated; and</li> <li>5. That the Court grant such other and further relief as it deems just and proper.</li> </ol>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order 6/2/15:</b> Counsel (John Hastrup) advises that previous counsel, Ms. Erlach, has resigned from their practice. Counsel is directed to obtain the signature of the Conservator for the account, with all additional documents being filed no later than 8/4/15.</p> <p><b>Minute Order 8/18/15:</b> Mr. Sullivan is in court regarding another matter this morning and reports that he has personal knowledge that Mr. Hastrup's wife might be in labor.</p> <p>As of 9/10/15, nothing further has been filed.</p> <p><b>Note:</b> A Substitution of Attorney has not been filed; therefore, Mara M. Erlach remains attorney of record.</p> <p><b>SEE ADDITIONAL PAGES</b></p> <p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 9/10/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 10 – Pasley</b></p>
<p>Cont. from 042315, 060215, 081815</p>			
	Aff.Sub.Wit.		
	Verified	x	
✓	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	x	
	Aff.Mail	x	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters	3/28/13	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order	x	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

## 10 Morgan Elizabeth Pasley (CONS/PE) Case No. 12CEPR00938

1. This petition does not provide any accounting in the form required by Probate Code §§ 2620, 1060, or any mandatory schedules on the required Judicial Council forms.

Need amended petition with accounting, schedules, including required mandatory form for summary. Although Petitioner has been appointed Guardian in Oklahoma, this Court retains jurisdiction for settling accounts pursuant to Probate Code §2630.

The only schedule provided at Exhibit B is a statement of property on hand, labeled as "receipts," but which does not show any account summary, receipts, disbursements, etc., and further indicates that the conservatorship estate cash has been reduced by \$11,722.70 without explanation.

Note: The Conservatee's interest in the Virginia real property is not an asset of this conservatorship estate, but should be referenced in its own schedule pursuant to §1063(h).

2. This petition is not verified by the Conservator as required by Probate Code §§ 1021, 1023. (Note: §1023 provides that an attorney may sign or verify on a client's behalf if he or she is absent from the county unless the person is a fiduciary appointing in the proceeding.)
3. Petitioner requests attorney's compensation pursuant to Exhibit C, but no Exhibit C is attached.
4. Need Notice of Hearing.
5. Need proof of service of Notice of Hearing at least 15 days prior to the hearing pursuant to Probate Code §1460(b)(6) on:
  - Morgan Elizabeth Pasley (Conservatee)
  - Debra Pasley (Conservator/Fiduciary, since the petition is not verified by her)
  - David Hal Jones (Father)
6. *The Court may also require notice to the surety of any continued or future hearings.*

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

DOD: 05/23/2013	DONALD J. GRANZ, son, was appointed Executor with full IAEA authority without bond, on 09/03/2013.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Letters issued 09/03/2013	<p><b>Continued from 05/12/2015.</b></p> <p>1. Need First Account or Petition for Final Distribution.</p>
Cont. from 110714, 051215	Partial No. 1 Inventory and Appraisal filed 01/29/2014 shows an estate valued at \$361,346.16.	
Aff.Sub.Wit.	Final Inventory and Appraisal filed 01/29/2014 shows an estate valued at \$200,000.00.	
Verified	Minute Order of 09/03/2013 set this Status Hearing for the filing of the First Account and/or Final Distribution.	
Inventory	<p><b>Status Report of Counsel filed 08/27/2015</b> states as reported in the prior Status Report in early 2015, the Executor discovered a large number of original stock certificates in the Decedent's name for shares or stock in multiple companies. When the Executor's attempts to sort and liquidate the certificates became onerous, he retained the services of Patrick Howell of RBC Wealth Management to assist him. The Executor is currently working with Mr. Howell to marshal all of the Decedent's shares in Decedent's name into an Estate account at RBC Wealth Management to facilitate administration and distribution.</p> <p>The Executor has also retained the services of a certified public accountant and is currently in the process of preparing an accounting of the Estate. In the process of working with the CPS, the Executor discovered that some of the early bank and investment account statements were inadvertently not retained during the clean up of the Decedent's residence for sale. The Executor has requested duplicate statements and anticipates being in a position to file his first account and report (which Petition will include a request for the authority to make a preliminary distribution to the beneficiaries) within sixty (60) days.</p> <p>The other two beneficiaries of the estate, the Executor's siblings, are aware of the status of the estate and want Donald J. Granz, Jr. to continue as Executor. The Executor requests that the Court continue this matter for sixty days to allow him to finalize the accounting.</p>	
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><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 09/10/2015</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 11 - Granz</b></p>

Attorney Bagdasarian, Gary G. (for Linda Plitt – daughter)  
 Attorney Barkinskaya, Jennie (for Conservatee)  
 Objector Loeffler, Mick (pro per – son)  
 Attorney Downing, Marcella and McLaughlin, William T. (for Diane Huerta – daughter/Petitioner)  
 Attorney Johnson, Summer A (for Bruce Bickel – temporary conservator of the estate/trustee)

Probate Status Hearing RE: Temporary Orders/Letters

	<p><b>The Current Letters of Temporary Conservatorship expire on 09/15/15.</b></p> <p>On 07/26/13, <b>DIANE HUERTA</b>, daughter, filed a Petition to appoint Diane Huerta and Linda Plitt as temporary and permanent co-conservators of the Person and Estate.</p> <p>Temporary Conservatorship was granted on 07/29/13 and Temporary Letters were issued on 07/30/13. At a hearing on 08/19/13, the temporary Conservatorship was denied and Temporary Letters were not extended. On 09/25/13, Judge Black appointed Bruce Bickel as Temporary Conservator of the Estates of Fred and Kathleen Loeffler.</p> <p>Since 09/25/13, the parties have engaged in numerous settlement talks, mediation, and several hearings have been heard before this court in this matter and the Temporary Letters of Conservatorship have been extended numerous times.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><u>CONTINUED FROM 06/16/15</u></b></p>
<b>Cont. from 061615</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 09/10/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 12 - Loeffler</b></p>	



Attorney Bagdasarian, Gary G. (for Linda Plitt – daughter)  
 Attorney Barkinskaya, Jennie (for Conservatee)  
 Attorney Jenkins, Shani D (for Mick Loeffler – son)  
 Attorney Downing, Marcella and McLaughlin, William T. (for Diane Huerta – daughter/Petitioner)  
 Attorney Johnson, Summer A (for Bruce Bickel – temporary conservator of the estate/trustee)

**Probate Status Hearing**

	On 08/19/13, <b>DIANE HUERTA</b> , daughter of Trustor's Fred and Kathleen Loeffler, filed a Petition to Determine the Validity of the Trust Modifying the Trust, Removing Trustees, Appointing Trustees, Instructing the Trustee, Compelling Redress of Breach of Trust, and Preliminary Injunction and Prohibition of Further Distributions to Mick Loeffler.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u><b>CONTINUED FROM 06/16/15</b></u></p> <p><b>Note:</b> Ex Parte Petition for Order Authorizing Payment of Trustors' Attorney's Fees from Trust Brokerage Account at RBC is set for hearing on 10/08/15.</p>
<b>Cont. from 061615</b>	Since 08/19/13, the parties have engaged in numerous settlement talks, mediation, and several hearings have been heard before this court.	
<b>Aff.Sub.Wit.</b>	On 04/28/15, Diane Huerta, filed a Notice of Motion and Motion to Disqualify Conservatees' Attorneys of Record. The matter was heard on 06/10/15 and the Court has taken the matter under submission.	
<b>Verified</b>	<b>Status Report</b> filed 06/11/15 by Jennie Barkinskaya, attorney for Fred and Kathleen Loeffler, states: The Loefflers do not object to Petitioner Diane Huerta's request to not vacate the trial and hearing dates in this matter and the related conservatorship matters. The parties are awaiting the Court's ruling on Diane Huerta's Motion to Disqualify Conservatees' Attorneys of Record.	
<b>Inventory</b>	<b>Order After Hearing on Petition to Disqualify Conservatee's Counsel of Record</b> denying the motion was filed 09/04/15.	
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 09/10/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 14 - Loeffler</b></p>

	<b>PUBLIC GUARDIAN</b> was appointed Conservator of the Person on 2/10/2014; Letters issued on 2/20/2014.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
	<b>PUBLIC GUARDIAN</b> was appointed Conservator of the Estate on 8/26/2014; <i>First Amended Letters</i> reflecting appointment as Conservator of the Person and Estate issued on 9/2/2014.	
Cont. from	Final Inventory and Appraisal filed 03/25/2015 shows an estate valued at \$1,191,306.58.	
Aff.Sub.Wit.	<b>Minute Order dated 8/26/2014</b> from the hearing on the Public Guardian's <i>Petition for Appointment of Probate Conservator of the Estate</i> set this hearing on 09/15/2015 for filing of the <i>First Account</i> .	
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		Reviewed by: LV
Status Rpt		Reviewed on: 09/10/2015
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 15 – Rousseau

Atty Renge, Lawson K. (for Administrator Ryan Missakian)

Probate Status Hearing Re: Inventory & Appraisal

<b>DOD: 10/3/2013</b>	<b>RYAN MISSAKIAN</b> was appointed as Administrator with full IAEA and without bond on 7/21/2014. <b>Letters issued on 7/22/14.</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>Continued from 7/28/2015.</b> Minute Order states Mr. Renge represents that the two partial inventories and appraisals constitute the final; the Court directs him to submit a filing with regard to that issue.
	<b>I &amp; A partial no. 1 was filed on 9/15/14</b> showing a value of <b>\$375,000.00.</b>	
	<b>I &amp; A partial no. 2 was filed on 3/12/15</b> showing a value of <b>\$370,000.00.</b>	
<b>Cont. from 121714, 031715, 072815</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>	X	
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>	<p><b>Minute Order dated 3/17/2015</b> continued the status hearing for the filing of the inventory and appraisal to 7/28/2015, and states if the final inventory and appraisal is filed at least two court days prior, then no appearance is necessary on 7/28/2015.</p> <p><b>Status Report Re Closure of Estate filed on 7/24/2015 for the former status hearing states:</b></p> <ul style="list-style-type: none"> <li>A reason for non-closure of the estate has been the avoidance of foreclosure of Decedent's residential property on Columbia Drive;</li> <li>One of the beneficiaries of the estate, Ryan Missakian, has acquired the property from the other beneficiary, Harold A. Missakian;</li> <li>The only remaining issue affecting estate closure is the alleged "partnership interest" of Decedent in agricultural property on Golden State Blvd. in Selma;</li> <li>The property shall be distributed to the two estate beneficiaries in equal shares, becoming co-owners with two other persons who already own an interest in the property;</li> <li>Beneficiaries propose that the partnership issue be resolved after probate distribution of the agricultural property to them from probate; no resolution of this issue has occurred.</li> </ul>	<p>1. Need declaration regarding two partial inventories constituting the <i>Final Inventory and Appraisal</i> pursuant to Probate Code § 8800(b).</p> <p><b>Note:</b> Partial Inventory No. 1 and Partial Inventory No. 2 do not satisfy the requirement for a final inventory and appraisal, and if no additional assets will comprise the estate, Petitioner should so indicate that to the Court.</p> <p><b>Note:</b> Status Hearing is not currently set for filing of the petition for final distribution. Court will set status hearing as follows:</p> <ul style="list-style-type: none"> <li><b>Monday, November 16, 2015 at 9:00 a.m. in Dept. 303</b> for filing of the final account and petition for final distribution.</li> </ul> <p>Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the dates listed, the hearing will be taken off calendar and no appearance will be required.</p>
<b>Aff. Posting</b>		<b>Reviewed by:</b> LEG
<b>Status Rpt</b>		<b>Reviewed on:</b> 9/9/15
<b>UCCJEA</b>		<b>Updates:</b>
<b>Citation</b>		<b>Recommendation:</b>
<b>FTB Notice</b>		<b>File 17 - Missakian</b>

**18 Sylvia Valencia (Estate) Case No. 14CEPR00857**

**Attorney Rodriguez, Frankie (for Primavera Damme – Administrator)**

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

<b>DOD: 08/01/2013</b>	<b>PRIMAVERA DAMME</b> , daughter, was appointed Executor with Full IAEA with bond of <b>\$175,000.00</b> on 4/14/2015.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need Inventory and Appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
	Receipt of Bond filed in the amount of \$175,000.00.	
<b>Cont. from</b>	Letters issued on 09/08/2015.	
<b>Aff.Sub.Wit.</b>	<p><b>Minute Order dated 4/14/2015</b> from the hearing on the petition for letters of administration set the matter for a Status Hearing on 09/15/2015 for filing of the Inventory and Appraisal.</p>	
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>	<p><b>Reviewed by:</b> LV</p>	
<b>9202</b>	<p><b>Reviewed on:</b> 09/10/2015</p>	
<b>Order</b>	<p><b>Updates:</b></p>	
<b>Aff. Posting</b>	<p><b>Recommendation:</b></p>	
<b>Status Rpt</b>	<p><b>File 18 – Valencia</b></p>	
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		



The trust provides that no bond shall be required of any person named in the instrument as Trustee.

**Petitioner requests that:**

1. The Court appoint Steven Seagraves as sole successor Trustee of the Seagraves Family Trust dated June 13, 2012;
2. Steven Seagraves be granted full authority as sol Successor Trustee of the real property assets of the Trust including but not limited to property located at 5078 E. Weathermaker, Fresno;
3. The Court determine that no bond be required of the sol Successor Trustee.

**Petition of Beneficiary to Appoint Successor Trustee**

		<b>EVELYN SANOIAN</b> , beneficiary, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W/	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		<b>Petitioner alleges:</b>	
		The AI Sanoian Irrevocable Trust dated 1/30/1980 was created by the AI Sanoian Irrevocable Trust Agreement.	
		Joanne Sanoian was the initial Trustee.	
		Joanne Sanoian died on 3/22/14, creating a vacancy in the office of Trustee.	
		The Trust instrument does not provide for the appointment of a successor Trustee.	
		Evelyn Sanoian, as income beneficiary, requests the Court appoint Bruce Bickel as successor Trustee, pursuant to the consents of all income beneficiaries. All income beneficiaries also waive bond.	
		Bruce Bickel consents to the appointment.	
		<b>Wherefore, the Petitioner requests that:</b>	
		1. The Court appoint Bruce Bickel as successor Trustee;	
		2. The Court waive the requirement of bond for the successor Trustee.	
		<b>Reviewed by:</b> KT	
		<b>Reviewed on:</b> 9/10/15	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 25 – Sanoian</b>	

**27 Evelyn Sanoian Irrevocable Trust dated Jan. 14, 1981**

**Case No. 15CEPR00741**

**Attorney: Gary G. Bagdasarian (for Petitioner Eveyln Sanoian)**

**Petition by Interested Party to Appoint Successor Trustee**

		<b>EVELYN SANOIAN</b> , interested party, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W/	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		<b>Petitioner alleges:</b>	
		The Evelyn Sanoian Irrevocable Trust dated 1/14/1981 was created by the Evelyn Sanoian Irrevocable Trust Agreement.	
		Joanne Sanoian was the initial Trustee.	
		Joanne Sanoian died on 3/22/14, creating a vacancy in the office of Trustee.	
		The Trust instrument does not provide for the appointment of a successor Trustee.	
		Evelyn Sanoian, as Grantor, requests the Court appoint Bruce Bickel as successor Trustee, pursuant to the consents of all income beneficiaries. All income beneficiaries also waive bond.	
		Bruce Bickel consents to the appointment.	
		<b>Wherefore, the Petitioner requests that:</b>	
		3. The Court appoint Bruce Bickel as successor Trustee;	
		4. The Court waive the requirement of bond for the successor Trustee.	
		<b>Reviewed by:</b> KT	
		<b>Reviewed on:</b> 9/10/15	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 27 – Sanoian</b>	