



## 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.

(1) Petition for Settlement of First and Final Account; Petition for Final Distribution and for (2) Allowance of Ordinary and Extraordinary

<b>DOD: 1-1-85</b>		<p><b>DORIS A. JOHNSON</b>, Administrator with Full IAEA with bond of \$75,000.00, is Petitioner.</p> <p><b>Account period: 1-1-85 through 7-18-14</b> Accounting: \$35,000.00 Beginning POH: \$35,000.00 Ending POH: \$7,401.44 (cash)</p> <p><b>Administrator (Statutory): \$760.00</b></p> <p><b>Administrator (Extraordinary): \$1,000.00</b> (for the sale of the real property)</p> <p><b>Attorney (Statutory): \$760.00</b></p> <p><b>Attorney (Extraordinary): \$1,000.00</b> (for the sale of the real property)</p> <p><b>Administrator requests reimbursement) for the following expenses totaling \$13,835.31:</b></p> <ul style="list-style-type: none"> <li>• <b>\$8,419.43</b> for payments to City of Fresno for lien against the real property from 2001 through 2005 (see itemization)</li> <li>• <b>\$1,015.88</b> for property tax payments from 2002 through 2014 (see itemization)</li> <li>• <b>\$4,400.00</b> was paid for disking, weeding, and general cleanup; however, itemization is not provided since there is not sufficient cash in the estate for reimbursement of these expenses</li> </ul> <p><b>Petitioner states</b> the estate is insolvent and the remaining balance after payment of closing expenses should be distributed to Doris A. Johnson for reimbursement of expenses advanced for the benefit of the estate to the extent of the remaining assets.</p> <p><b>Petitioner prays for an order that:</b></p> <ol style="list-style-type: none"> <li>1. Administration of this estate be closed;</li> <li>2. The first and final account be approved;</li> <li>3. Petitioner be allowed the sum of \$1,760.00 as its fee for ordinary and extraordinary services to the estate;</li> <li>4. Petitioner's attorney be allowed the sum of \$1,760.00 as its fee for ordinary and extraordinary services to the estate;</li> <li>5. All acts, transactions, sales, and investments of the personal representative be ratified, approved, and confirmed; and</li> <li>6. The remaining balance of the estate in the amount of \$3,881.44 be distributed to Petitioner as reimbursement for expenses advanced to the benefit of the estate.</li> </ol>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> The intestate heirs to this estate would be Petitioner Doris Johnson, her two siblings Mildred Hodges and Leonard Bradley, and the issue of a post-deceased sibling Edna Cox: Darryl Cox, Cynthia Clanton, and Sharon Cox-Plousha.</p> <p><b><u>SEE ADDITIONAL PAGES</u></b></p>
<b>Cont. from 082714</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> W		
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
✓	<b>Letters</b> 8-27-07		
	<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>		
N/A	<b>FTB Notice</b>		

**Reviewed by:** skc

**Reviewed on:** 9-22-14

**Updates:**

**Recommendation:**

**File 1 – Bradley**

Page 2

**NEEDS/PROBLEMS/COMMENTS: Prior Examiner Notes noted the following:**

1. This estate was opened in 2007 and sat dormant for seven years, incurring expenses, without any status report filed with the Court or served on heirs.  
  
This does not appear to have been a benefit to the estate; rather, it appears to have been detrimental. Petitioner does not address why the estate was not closed timely pursuant to Probate Code §12200.  
  
Examiner notes the following circumstances:  
  
2. (Cont'd): The I&A filed in 2007 valued the real property at \$35,000.00 as of the decedent's date of death, which was in 1985; however, in 2007, the property's value was estimated at \$75,000.00. Bond was fixed at \$75,000.00 because Administrator was granted authority under IAEA to sell the property.  
  
If the estate had been administered timely, there may have been proceeds available for distribution to the heirs. However, because it was not, the value decreased significantly between 2007 and 2014 and the Administrator incurred \$13,835.31 in expenses for which she now requests reimbursement, as well as expenses for bond premiums for seven years, for which she has apparently already reimbursed herself per the disbursements schedule.  
  
Petitioner requests the Court approve all acts and transactions of the Administrator, without addressing these circumstances, and stating that her expenses incurred were beneficial to the estate. Need clarification.
3. Petitioner requests the full amount of statutory compensation as well as extraordinary compensation for herself and her attorney. The Court may require clarification with reference to the above circumstances and Probate Code §§ 12200 (noticed final account or report of status) and 12205 (Court may reduce compensation).
4. The Court may require notice to the surety for any further or continued hearing on this matter.  
  
Note: Bond of \$75,000.00 was filed on 8-27-07 per Court records (Banner); however, the original bond does not appear to be in the file. The Court may require a copy of the bond for the file.

---

**Minute Order 8-27-14: Counsel is to file declaration regarding issues and why fees should not be reduced. Based on the information the Court is satisfied that Ms. Johnson has been continuously handling the Estate and Property has been listed since 2008. Continued to 9/24/14.**

**Declaration of Doris A. Johnson Re: Delay in Distribution of Estate filed 9-11-14 states** that at the time her mother passed away in 1985, her brother was living in the property and everyone agreed to let him stay there. He was paying the property taxes and another sister was supposed to take care of insurance. In 1995, the house was destroyed by fire and it was discovered that the insurance had lapsed so there was no money to rebuild it. In 1997, Ms. Johnson tried to settle the estate via petition to determine succession; however, there were issues with other heirs. In 2001, they were starting to get inquiries from people interested in buying the property, and in 2007 a realtor informed her that the property could be sold, so she retained an attorney to proceed with the sale. However, no offers were received. She re-listed the property in 2008. The first offer received was in 2014 for \$19,000. Despite having authority, Court order confirming the sale was necessary because of objections to the sale. As shown in the account, she has paid from her own pocket the liens against the property. The delay in closing the estate was due to the real estate market and not because of any lack of diligence to sell the property.

**(1) First and Final Report of Executor on Waiver of Account and (2) Petition for Final Distribution and (3) for Allowance of Compensation to Executor and Attorneys for Ordinary Services**

<b>DOD: 12/03/11</b>	<b>MICHAEL R. HAYS</b> , Executor, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. The Petition does not address notice to the Franchise Tax Board as required pursuant to Probate Code § 9202(c).</p> <p><b>Note:</b> All beneficiaries have waived Notice of Hearing.</p>
	Accounting is waived.	
	I & A - <b>\$163,372.97</b>	
	POH - <b>\$160,488.01</b> (\$8,488.01 is cash)	
<b>Cont. from</b>	Executor - <b>\$5,901.19</b> (statutory)	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Attorney (statutory) - <b>\$634.15</b> (less than statutory)	
<input checked="" type="checkbox"/> <b>Verified</b>	Costs - <b>\$1,452.67</b> (filing fees, publication, certified copies, probate referee)	
<input checked="" type="checkbox"/> <b>Inventory</b>	Closing - <b>\$500.00</b>	
<input checked="" type="checkbox"/> <b>PTC</b>	<b>Distribution, pursuant to Decedent's Will, is to:</b>	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	Christine Louise Hays aka Christine Hays Slater - ¼ undivided interest as a Tenant in Common to a ½ interest in a recreational residence at Huntington Lake (APN: 110-150-48P); ¼ undivided interest in all items of personal property located at the recreational residence; ¼ undivided interest in 1975 16 foot Sailboat; and ¼ undivided interest in 1978 Valco aluminum fishing boat	
<b>Notice of Hrg</b> n/a	Ann Hays Walorinta - ¼ undivided interest as a Tenant in Common to a ½ interest in a recreational residence at Huntington Lake (APN: 110-150-48P); ¼ undivided interest in all items of personal property located at the recreational residence; ¼ undivided interest in 1975 16 foot Sailboat; and ¼ undivided interest in 1978 Valco aluminum fishing boat	
<b>Aff.Mail</b> n/a		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b> 05/17/12		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<input checked="" type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b> x		

Continued on Page 2

Lynn Hays Kyle -  $\frac{1}{4}$  undivided interest as a Tenant in Common to a  $\frac{1}{2}$  interest in a recreational residence at Huntington Lake (APN: 110-150-48P);  $\frac{1}{4}$  undivided interest in all items of personal property located at the recreational residence;  $\frac{1}{4}$  undivided interest in 1975 16 foot Sailboat; and  $\frac{1}{4}$  undivided interest in 1978 Valco aluminum fishing boat

Michael R. Hays -  $\frac{1}{4}$  undivided interest as a Tenant in Common to a  $\frac{1}{2}$  interest in a recreational residence at Huntington Lake (APN: 110-150-48P);  $\frac{1}{4}$  undivided interest in all items of personal property located at the recreational residence;  $\frac{1}{4}$  undivided interest in 1975 16 foot Sailboat; and  $\frac{1}{4}$  undivided interest in 1978 Valco aluminum fishing boat; 23 guns; and miscellaneous shop and gardening equipment

**(1) First and Final Report of Executor on Waiver of Account and (2) Petition for Final Distribution and (3) for Allowance of Compensation to Executor and Attorneys for Ordinary Services**

<b>DOD: 12/23/11</b>	<b>CHRISTINE HAYS</b> , Executor, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>2. The Petition does not address notice to the Franchise Tax Board as required pursuant to Probate Code § 9202(c).</p> <p><b>Note:</b> All beneficiaries have waived Notice of Hearing.</p> <p><b>Note:</b> Consistent with the Court's recent practice, the Court may require a closing reserve greater than \$5,000.00 be subjected to an informal accounting within 6 months after the distribution order. If the Court determines an informal accounting of the closing reserve is warranted, a Status Hearing will be set as follows:</p> <ul style="list-style-type: none"> <li><b>Wednesday, March 25, 2015 at 9:00 a.m. in Dept. 303</b> for an Informal Accounting of the <b>\$25,000.00</b> Closing Reserve.</li> </ul> <p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 09/19/14</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 3 - Hays</b></p>
	Accounting is waived.	
	I & A - <b>\$1,859,523.73</b>	
	POH - <b>\$1,778,387.56</b> (\$411,213.70 is cash)	
<b>Cont. from</b>	Executor - <b>\$30,246.84</b> (statutory)	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Attorney - <b>\$30,246.84</b> (statutory)	
<input checked="" type="checkbox"/> <b>Verified</b>	Costs - <b>\$3,001.76</b> (filing fee, publication, certified letters, recording fees, probate referee)	
<input checked="" type="checkbox"/> <b>Inventory</b>	Closing - <b>\$25,000.00</b>	
<input checked="" type="checkbox"/> <b>PTC</b>	<b>Distribution, pursuant to Decedent's will and agreement of the beneficiaries, is to:</b>	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	<b>Christine Louise Hays aka Christine Hays Slater</b> - \$80,679.56 cash, Ladies lapis and cultured pearl necklace, bracelet, ring and earrings; ¼ undivided interest as a Tenant in Common to a ½ interest in a recreational residence at Huntington Lake (APN: 110-150-48P); ¼ undivided interest in all items of personal property located at the recreational residence; and various stocks/funds	
<b>Notice of Hrg</b> n/a	<b>Ann Hays Walorinta</b> - \$80,679.56 cash, Ladies platinum diamond wedding set and 14K gold omega style necklace; ¼ undivided interest as a Tenant in Common to a ½ interest in a recreational residence at Huntington Lake (APN: 110-150-48P); ¼ undivided interest in all items of personal property located at the recreational residence; and various stocks/funds	
<b>Aff.Mail</b> n/a		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b> 05/17/12		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<input checked="" type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b> x		

Continued on Page 2

**Lynn Hays Kyle** - \$80,679.56 cash, Ladies 14K yellow gold ladies ruby and diamond ring;  $\frac{1}{4}$  undivided interest as a Tenant in Common to a  $\frac{1}{2}$  interest in a recreational residence at Huntington Lake (APN: 110-150-48P);  $\frac{1}{4}$  undivided interest in all items of personal property located at the recreational residence; and various stocks/funds

**Michael R. Hays** - \$80,679.56 cash, one share of capital stock in Reeves Lakeland Company, LTD-Duck Club; Ladies 14K yellow gold diamond pendant set with three diamonds;  $\frac{1}{4}$  undivided interest as a Tenant in Common to a  $\frac{1}{2}$  interest in a recreational residence at Huntington Lake (APN: 110-150-48P);  $\frac{1}{4}$  undivided interest in all items of personal property located at the recreational residence; and various stocks/funds

Atty Poochigian, Mark S., of Baker Manock & Jensen (for Petitioner Raymond Lynch, Jr.)  
 Atty Fanucchi, Edward L., of Quinlan, Kershaw & Fanucchi (Court-appointed for Conservatee)

**Petition for Authority to Place Conservatee in a Secured Perimeter Facility**

<b>Age: 81 years</b>	<b>RAYMOND LYNCH, JR.</b> , son and Conservator of the Person and Estate appointed on 12/3/2012, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>Note:</b> Probate Code § 2356.5(f) provides regarding petitions for authority for placement in a secured facility that:
<b>Cont. from</b>	<b>Petitioner states:</b>	(1) The Conservatee shall be represented by an attorney;
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	<ul style="list-style-type: none"> <li>The Conservatee has dementia and would benefit from placement in a locked and secured nursing facility which specializes in the care and treatment of people with dementia under Health and Safety Code § 1569.691(c), and which has a care plan that meets the requirements of former § 87724 of Title 22 of the California Code of Regulations ("Section 2356.5 facility");</li> </ul>	
<input checked="" type="checkbox"/> <b>Verified</b>	<ul style="list-style-type: none"> <li>Placement in a locked facility is the least restrictive placement appropriate to the needs of the Conservatee;</li> </ul>	(3) The petition shall be supported by a declaration of a licensed physician with at least 2 years' experience in diagnosing dementia, regarding each of the findings to be made by the Court by clear and convincing evidence under Probate Code § 2356.5(b)(1) through (b)(4). It appears based upon the pleadings that the <i>Petition</i> addresses each of the requirements in support of Petitioner's request, including the production of the Conservatee at the hearing which appears to be excused under Probate Code § 1893(b) per Item 5(b)(2) of the <i>Capacity Declaration</i> of Dr. Sams attached to the <i>Petition</i> .
<input type="checkbox"/> <b>Inventory</b>	<ul style="list-style-type: none"> <li>Petitioner proposes to place the Conservatee in <b>GOLDEN LIVING CENTER</b>, Fresno, or other appropriate facility;</li> </ul>	
<input type="checkbox"/> <b>PTC</b>	<ul style="list-style-type: none"> <li>The Conservatee lacks the capacity to give informed consent to the placement;</li> </ul>	
<input checked="" type="checkbox"/> <b>Capacity Dec.</b>	<ul style="list-style-type: none"> <li>The Conservatee has at least one mental function deficit under Probate Code § 811(a), and this deficit significantly impairs the Conservatee's ability to understand and appreciate the consequences of her actions;</li> </ul>	
<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 checked="" 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>		

~Please see additional page~

**Petitioner states, continued:**

- **DR. O'KEY I. SAMS** has at least 2 years of experience in diagnosing dementia; copy of *Capacity Declaration* [dated 8/11/2014] completed by Dr. Sams and attached as *Exhibit A* contains the following information [as required pursuant to Probate Code §2356.5(b)(1) through (b)(4) and § 2356.5(f)(3)]:
  - The deficit in the Conservatee's impaired mental functions;
  - The correlation between the mental function deficit and the Conservatee's inability to respond knowingly and intelligently to queries about the recommended medical treatment or inability to participate in a treatment decision about the recommended placement by means of a rational thought process;
  - A statement of opinion that the Conservatee lacks the capacity to give informed consent to the placement, and that the Conservatee needs or would benefit from the proposed placement, and that the proposed placement in a Section 2356.5 facility is the least restrictive placement appropriate to the needs of the Conservatee.

**Petitioner prays for an order that the Conservator be authorized and directed to place the Conservatee in a locked and/or secured nursing facility which specializes in the care and treatment of people with dementia under Health and Safety Code § 1569.691(c).**

<b>DOD: 02/14/13</b>	<p><b>JUDGE SINGH BRAR</b>, son, was appointed Executor with full IAEA and without bond on 06/12/13. Letters Testamentary were issued on 06/12/13.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b>  <b><u>CONTINUED FROM 08/15/14</u></b></p> <p>1. Need Accounting/Report of Administration and Petition for Final Distribution.</p>
<b>Cont. from 081514</b>	Inventory & Appraisal, final, filed 08/27/13 - \$2,711,583.00	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>	Inventory & Appraisal, Supplemental No. 1, filed 12/11/13 -\$171,804.95	
<b>PTC</b>		
<b>Not.Cred.</b>	Inventory & Appraisal, Supplemental No. 1 corrected, filed 05/12/14 - \$101,043.95	
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>	<b>Status Report filed 09/09/14</b> states: a State Income Tax Clearance Certificate is required. A 90 day continuance is requested to continue working with an accountant on the tax returns.	
<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>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 09/19/14
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 6 – Brar</b>

**7 Clyde Bass Morris (Estate)**

**Case No. 13CEPR01034**

**Atty Bagdasarian, Gary G. (for Nancy Hamilton – former Administrator)**

**Atty Kruthers, Heather H. (for Public Administrator – Special Administrator/Petitioner)**

**Petition for Letters of Administration; Authorization to Administer Under the Independent Administration of Estate Act (Prob.C.8002,10450)**

<b>DOD: 10/03/13</b>	<b>PUBLIC ADMINISTRATOR</b> , is Petitioner and requests appointment as Administrator with full IAEA and without bond.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> A status hearing for filing the First/Final Account and Petition for Distribution is set for 03/20/15.</p> <p>1. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Petition to Administer Estate</i> for Nancy Hamilton. (Petitioner states that her whereabouts are unknown, Gary Bagdasarian (attorney for Nancy Hamilton) was provided with notice).</p>	
<b>Cont. from</b>	<b>PUBLIC ADMINISTRATOR</b> was appointed Special Administrator (Ex Parte) on 08/20/14.		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	<p><b>Order Suspending Powers of Former Administrator</b> was signed/filed on 08/20/14.</p> <p>Full IAEA – Previously published by former administrator.</p> <p>Decedent died intestate</p> <p>Residence: Fresno Publication: The Business Journal (by former Administrator)</p> <p><b>Estimated Value of the Estate:</b> Real Property - \$145,000.00</p> <p>Probate Referee: <b>STEVEN DIEBERT</b></p>		
<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 checked="" type="checkbox"/> <b>Letters</b>			
<input type="checkbox"/> <b>Duties/Supp</b> n/a			
<input type="checkbox"/> <b>Objections</b>			
<input type="checkbox"/> <b>Video Receipt</b>			
<input type="checkbox"/> <b>CI Report</b>			
<input type="checkbox"/> <b>9202</b>			
<input checked="" type="checkbox"/> <b>Order</b>			
<input type="checkbox"/> <b>Aff. Posting</b>			
<input type="checkbox"/> <b>Status Rpt</b>			
<input type="checkbox"/> <b>UCCJEA</b>			
<input type="checkbox"/> <b>Citation</b>			
<input type="checkbox"/> <b>FTB Notice</b>			
		<b>Reviewed by:</b> JF	
		<b>Reviewed on:</b> 09/22/14	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 7 - Morris</b>	

<b>DOD: 06/30/2013</b>	<p><b>ROBERT LEE ADAMS</b>, was appointed Executor with full IAEA authority, with bond set at \$13,000.00 on 04/16/2014.</p> <p>Bond was filed 05/20/2014 in the amount of \$13,000.00.</p> <p>Letters were issued on 05/20/2014.</p> <p>Inventory &amp; Appraisal Partial No. 1 showing a value of \$569,418.26 filed 08/21/2014.</p> <p>Minute Order of 04/16/2014 set this status hearing for the filing of the Inventory and Appraisal.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need <b>Final Inventory and Appraisal</b> 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>
<b>Cont. from 081514</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> LV</p> <p><b>Reviewed on:</b> 09/22/2014</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 8 – Edmonds</b></p>

Atty Lucich, Jr., Nicholas L. (of Helon & Mandredo, for Howard J. DeMera, Trustee)  
 Atty Keeler, Jr., William J. (of Garvey Schubert Barer, also for Howard J. DeMera, Trustee)

Petition for Settlement and Approval of Trustee's Account

		<p><b>HOWARD J. DEMERA</b>, Trustee, is Petitioner.</p> <p><b>Petitioner states:</b></p> <ul style="list-style-type: none"> <li>On 4/11/2003, <b>JOSEPH F. DESMOND</b> as Trustor and Grantor, executed a Trust Agreement establishing the <b>MARGARET A. HUGHES IRREVOCABLE TRUST IV</b>, of which the Petitioner is named as Trustee (<i>copy of the HUGHES TRUST IV attached at Exhibit I</i>);</li> <li><b>MARGARET A. HUGHES</b> is the adult daughter of Trustor <b>JOSEPH F. DESMOND</b>, who also had one other daughter, <b>JOAN D. GASKINS</b>; Mr. Desmond also established on 4/11/2003 the <b>JOAN D. GASKINS IRREVOCABLE TRUST III</b>; both trusts were created as part of his estate plan;</li> <li>Mr. Desmond made gifts to these trust and the trusts also acquired interests in two of Mr. Desmond's business entities (J.F Desmond Family Limited Partnership and Desmond Family Real Estate Limited Partnership);</li> <li>Petitioner has previously provided an accounting to <b>MARGARET A. HUGHES</b>, who is the present income beneficiary of the <b>HUGHES TRUST IV</b> and the only person to whom an account is required, and Petitioner has reviewed the accounting with her; Trustee desires to present his accounting for settlement and to provide copies and notice of the accounting to contingent trust beneficiaries;</li> <li>Exhibits II, III and IV together make up Petitioner's accounting of the <b>HUGHES TRUST IV</b> for the period from 4/11/2003 through 12/31/2011, as follows:</li> </ul>	<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <p>Page 9 through Page 15 are related cases.</p>																																																																								
<p><b>Cont. from</b></p> <table border="1"> <tr> <td>Aff.Sub.Wit.</td> <td></td> </tr> <tr> <td>✓ Verified</td> <td></td> </tr> <tr> <td>Inventory</td> <td></td> </tr> <tr> <td>PTC</td> <td></td> </tr> <tr> <td>Not.Cred.</td> <td></td> </tr> <tr> <td>✓ Notice of Hrg</td> <td></td> </tr> <tr> <td>✓ Aff.Mail</td> <td>W/</td> </tr> <tr> <td>Aff.Pub.</td> <td></td> </tr> <tr> <td>Sp.Ntc.</td> <td></td> </tr> <tr> <td>✓ Pers.Serv.</td> <td>W/</td> </tr> <tr> <td>Conf. Screen</td> <td></td> </tr> <tr> <td>Letters</td> <td></td> </tr> <tr> <td>Duties/Supp</td> <td></td> </tr> <tr> <td>Objections</td> <td></td> </tr> <tr> <td>Video Receipt</td> <td></td> </tr> <tr> <td>CI Report</td> <td></td> </tr> <tr> <td>9202</td> <td></td> </tr> <tr> <td>✓ Order</td> <td></td> </tr> <tr> <td>Aff. Posting</td> <td></td> </tr> <tr> <td>Status Rpt</td> <td></td> </tr> <tr> <td>UCCJEA</td> <td></td> </tr> <tr> <td>Citation</td> <td></td> </tr> <tr> <td>FTB Notice</td> <td></td> </tr> </table>		Aff.Sub.Wit.			✓ Verified		Inventory		PTC		Not.Cred.		✓ Notice of Hrg		✓ Aff.Mail	W/	Aff.Pub.		Sp.Ntc.		✓ Pers.Serv.	W/	Conf. Screen		Letters		Duties/Supp		Objections		Video Receipt		CI Report		9202		✓ Order		Aff. Posting		Status Rpt		UCCJEA		Citation		FTB Notice		<p><b>Account period: 4/11/2003 – 12/31/2008</b></p> <table border="0"> <tr> <td>Accounting</td> <td>-</td> <td>\$1,136,201.95</td> </tr> <tr> <td>Beginning POH</td> <td>-</td> <td>\$ 20,000.00</td> </tr> <tr> <td>Ending POH</td> <td>-</td> <td>\$ 989,761.76</td> </tr> </table> <p><b>Account period: 1/1/2009 – 12/31/2010</b></p> <table border="0"> <tr> <td>Accounting</td> <td>-</td> <td>\$1,077,973.40</td> </tr> <tr> <td>Beginning POH</td> <td>-</td> <td>\$ 989,761.76</td> </tr> <tr> <td>Ending POH</td> <td>-</td> <td>\$ 986,016.00</td> </tr> </table> <p><b>Account period: 1/1/2011 – 12/31/2011</b></p> <table border="0"> <tr> <td>Accounting</td> <td>-</td> <td>\$1,036,737.25</td> </tr> <tr> <td>Beginning POH</td> <td>-</td> <td>\$ 986,016.00</td> </tr> <tr> <td>Ending POH</td> <td>-</td> <td>\$ 989,184.74</td> </tr> </table> <p><b>Wherefore, Petitioner prays for an order of this Court:</b></p> <ol style="list-style-type: none"> <li>Settling, allowing and approving the account and report of Petitioner as Trustee as filed;</li> <li>Confirming and approving all acts and proceedings of Petitioner as Trustee.</li> </ol>	Accounting	-	\$1,136,201.95	Beginning POH	-	\$ 20,000.00	Ending POH	-	\$ 989,761.76	Accounting	-	\$1,077,973.40	Beginning POH	-	\$ 989,761.76	Ending POH	-	\$ 986,016.00	Accounting	-	\$1,036,737.25	Beginning POH	-	\$ 986,016.00	Ending POH	-
Aff.Sub.Wit.																																																																											
✓ Verified																																																																											
Inventory																																																																											
PTC																																																																											
Not.Cred.																																																																											
✓ Notice of Hrg																																																																											
✓ Aff.Mail	W/																																																																										
Aff.Pub.																																																																											
Sp.Ntc.																																																																											
✓ Pers.Serv.	W/																																																																										
Conf. Screen																																																																											
Letters																																																																											
Duties/Supp																																																																											
Objections																																																																											
Video Receipt																																																																											
CI Report																																																																											
9202																																																																											
✓ Order																																																																											
Aff. Posting																																																																											
Status Rpt																																																																											
UCCJEA																																																																											
Citation																																																																											
FTB Notice																																																																											
Accounting	-	\$1,136,201.95																																																																									
Beginning POH	-	\$ 20,000.00																																																																									
Ending POH	-	\$ 989,761.76																																																																									
Accounting	-	\$1,077,973.40																																																																									
Beginning POH	-	\$ 989,761.76																																																																									
Ending POH	-	\$ 986,016.00																																																																									
Accounting	-	\$1,036,737.25																																																																									
Beginning POH	-	\$ 986,016.00																																																																									
Ending POH	-	\$ 989,184.74																																																																									
			<p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 9/22/14</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 9 - Hughes</b></p>																																																																								

Atty Lucich, Jr., Nicholas L. (of Helon & Mandredo, for Howard J. DeMera, Trustee)  
 Atty Keeler, Jr., William J. (of Garvey Schubert Barer, also for Howard J. DeMera, Trustee)

Petition for Settlement and Approval of Trustee's Account

		<p><b>HOWARD J. DEMERA</b>, Trustee, is Petitioner.</p> <p><b>Petitioner states:</b></p> <ul style="list-style-type: none"> <li>On 10/15/1993, <b>JOSEPH F. DESMOND</b> and <b>EDNA F. DESMOND</b>, as Trustors and Grantors, executed a Trust Agreement establishing the <b>JOAN D. GASKINS IRREVOCABLE TRUST</b>, of which the Petitioner is named as Trustee (copy of the <b>GASKINS TRUST</b> attached at Exhibit I);</li> <li><b>JOAN D. GASKINS</b> is the adult daughter of Trustors <b>JOSEPH F. DESMOND</b> and <b>EDNA F. DESMOND</b>, who also had one other daughter, <b>MARGARET A. HUGHES</b>;</li> <li>Mr. and Mrs. Desmond made gifts to these trust and the trusts also acquired interests in two of Mr. Desmond's business entities (J.F Desmond Family Limited Partnership and Desmond Family Real Estate Limited Partnership);</li> <li>Petitioner has previously provided an accounting to <b>JOAN D. GASKINS</b>, who is the present income beneficiary of the <b>GASKINS TRUST</b> and the only person to whom an account is required, and Petitioner has reviewed the accounting with her; Trustee desires to present his accounting for settlement and to provide copies and notice of the accounting to contingent trust beneficiaries;</li> <li>Exhibits II, III and IV together make up Petitioner's accounting of the <b>GASKINS TRUST</b> for the period from 10/15/1993 through 12/31/2011, as follows:</li> </ul>	<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <p>Page 9 through Page 15 are related cases.</p>																									
<p><b>Account period: 10/15/1993 – 12/31/2008</b></p> <table> <tr><td>Accounting</td><td>-</td><td>\$760,545.40</td></tr> <tr><td>Beginning POH</td><td>-</td><td>\$ 7,987.40</td></tr> <tr><td>Ending POH</td><td>-</td><td>\$751,041.40</td></tr> </table> <p><b>Account period: 1/1/2009 – 12/31/2010</b></p> <table> <tr><td>Accounting</td><td>-</td><td>\$862,163.10</td></tr> <tr><td>Beginning POH</td><td>-</td><td>\$751,041.40</td></tr> <tr><td>Ending POH</td><td>-</td><td>\$761,049.18</td></tr> </table> <p><b>Account period: 1/1/2011 – 12/31/2011</b></p> <table> <tr><td>Accounting</td><td>-</td><td>\$980,903.78</td></tr> <tr><td>Beginning POH</td><td>-</td><td>\$761,049.18</td></tr> <tr><td>Ending POH</td><td>-</td><td>\$628,214.42</td></tr> </table>		Accounting		-	\$760,545.40	Beginning POH	-	\$ 7,987.40	Ending POH	-	\$751,041.40	Accounting	-	\$862,163.10	Beginning POH	-	\$751,041.40	Ending POH	-	\$761,049.18	Accounting	-	\$980,903.78	Beginning POH	-	\$761,049.18	Ending POH	-
Accounting	-	\$760,545.40																										
Beginning POH	-	\$ 7,987.40																										
Ending POH	-	\$751,041.40																										
Accounting	-	\$862,163.10																										
Beginning POH	-	\$751,041.40																										
Ending POH	-	\$761,049.18																										
Accounting	-	\$980,903.78																										
Beginning POH	-	\$761,049.18																										
Ending POH	-	\$628,214.42																										
		<p><b>Wherefore, Petitioner prays for an order of this Court:</b></p> <ol style="list-style-type: none"> <li>Settling, allowing and approving the account and report of Petitioner as Trustee as filed;</li> <li>Confirming and approving all acts and proceedings of Petitioner as Trustee.</li> </ol>	<p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 9/22/14</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p>File 10 - Gaskins</p>																									
Cont. from																												
✓ Aff.Sub.Wit.																												
✓ Verified																												
Inventory																												
PTC																												
Not.Cred.																												
✓ Notice of Hrg																												
✓ Aff.Mail	W/																											
Aff.Pub.																												
Sp.Ntc.																												
✓ Pers.Serv.	W/																											
Conf. Screen																												
Letters																												
Duties/Supp																												
Objections																												
Video Receipt																												
CI Report																												
9202																												
✓ Order																												
Aff. Posting																												
Status Rpt																												
UCCJEA																												
Citation																												
FTB Notice																												

Atty Lucich, Jr., Nicholas L. (of Helon & Mandredo, for Howard J. DeMera, Trustee)  
 Atty Keeler, Jr., William J. (of Garvey Schubert Barer, also for Howard J. DeMera, Trustee)

Petition for Settlement and Approval of Trustee's Account

		<p><b>HOWARD J. DEMERA</b>, Trustee, is Petitioner.</p> <p><b>Petitioner states:</b></p> <ul style="list-style-type: none"> <li>On 9/26/1997, <b>JOSEPH F. DESMOND</b>, as Trustor and Grantor, executed a Trust Agreement establishing the <b>JOAN D. GASKINS IRREVOCABLE TRUST II</b>, of which the Petitioner is named as Trustee (copy of the <b>GASKINS TRUST II</b> attached at Exhibit I);</li> <li><b>JOAN D. GASKINS</b> is the adult daughter of Trustor <b>JOSEPH F. DESMOND</b>, who also had one other daughter, <b>MARGARET A. HUGHES</b>, for whom he established the <b>MARGARET A. HUGHES IRREVOCABLE TRUST III</b>; the <b>GASKINS TRUST II</b> and the <b>HUGHES TRUST III</b> were named as principal beneficiaries of estate planning trusts created by Mr. and Mrs. Desmond, and the trusts received substantial distributions after Mr. Desmond's death in August 2007;</li> <li>Petitioner has previously provided an accounting to <b>JOAN D. GASKINS</b>, who is the present income beneficiary of the <b>GASKINS TRUST II</b> and the only person to whom an account is required, and Petitioner has reviewed the accounting with her; Trustee desires to present his accounting for settlement and to provide copies and notice of the accounting to contingent trust beneficiaries;</li> <li>Exhibits II, III and IV together make up Petitioner's accounting of the <b>GASKINS TRUST</b> for the period from 9/26/1997 through 12/31/2011, as follows:</li> </ul>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Page 9 through Page 15 are related cases.</p>																									
<p><b>Account period: 9/26/1997 – 12/31/2008</b></p> <table border="0"> <tr> <td>Accounting</td> <td>-</td> <td>\$222,799.53</td> </tr> <tr> <td>Beginning POH</td> <td>-</td> <td>\$ 300.00</td> </tr> <tr> <td>Ending POH</td> <td>-</td> <td>\$222,663.53</td> </tr> </table> <p><b>Account period: 1/1/2009 – 12/31/2010</b></p> <table border="0"> <tr> <td>Accounting</td> <td>-</td> <td>\$237,473.66</td> </tr> <tr> <td>Beginning POH</td> <td>-</td> <td>\$222,663.53</td> </tr> <tr> <td>Ending POH</td> <td>-</td> <td>\$228,496.66</td> </tr> </table> <p><b>Account period: 1/1/2011 – 12/31/2011</b></p> <table border="0"> <tr> <td>Accounting</td> <td>-</td> <td>\$8,214,773.10</td> </tr> <tr> <td>Beginning POH</td> <td>-</td> <td>\$ 228,496.66</td> </tr> <tr> <td>Ending POH</td> <td>-</td> <td>\$7,111,405.47</td> </tr> </table>		Accounting		-	\$222,799.53	Beginning POH	-	\$ 300.00	Ending POH	-	\$222,663.53	Accounting	-	\$237,473.66	Beginning POH	-	\$222,663.53	Ending POH	-	\$228,496.66	Accounting	-	\$8,214,773.10	Beginning POH	-	\$ 228,496.66	Ending POH	-
Accounting	-	\$222,799.53																										
Beginning POH	-	\$ 300.00																										
Ending POH	-	\$222,663.53																										
Accounting	-	\$237,473.66																										
Beginning POH	-	\$222,663.53																										
Ending POH	-	\$228,496.66																										
Accounting	-	\$8,214,773.10																										
Beginning POH	-	\$ 228,496.66																										
Ending POH	-	\$7,111,405.47																										
<p><b>Wherefore, Petitioner prays for an order of this Court:</b></p> <ol style="list-style-type: none"> <li>Settling, allowing and approving the account and report of Petitioner as Trustee as filed;</li> <li>Confirming and approving all acts and proceedings of Petitioner as Trustee.</li> </ol>		<p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 9/22/14</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p>File 11 - Gaskins</p>																										
Cont. from																												
Aff.Sub.Wit.																												
✓ Verified																												
Inventory																												
PTC																												
Not.Cred.																												
✓ Notice of Hrg																												
✓ Aff.Mail	W/																											
Aff.Pub.																												
Sp.Ntc.																												
✓ Pers.Serv.	W/																											
Conf. Screen																												
Letters																												
Duties/Supp																												
Objections																												
Video Receipt																												
CI Report																												
9202																												
✓ Order																												
Aff. Posting																												
Status Rpt																												
UCCJEA																												
Citation																												
FTB Notice																												

Atty Lucich, Jr., Nicholas L. (of Helon & Manfredi, for Howard J. DeMera, Trustee)  
 Atty Keeler, Jr., William J. (of Garvey Schubert Barer, also for Howard J. DeMera, Trustee)

Petition for Settlement and Approval of Trustee's Account

	<p><b>HOWARD J. DEMERA</b>, Trustee, is Petitioner.</p> <p><b>Petitioner states:</b></p> <ul style="list-style-type: none"> <li>On 10/15/1993, <b>JOSEPH F. DESMOND</b> and <b>EDNA F. DESMOND</b>, as Trustors and Grantors, executed a Trust Agreement establishing the <b>MARGARET A. HUGHES IRREVOCABLE TRUST</b>, of which the Petitioner is named as Trustee (<i>copy of the HUGHES TRUST attached as Exhibit I</i>);</li> <li><b>MARGARET A. HUGHES</b> is the adult daughter of Trustor <b>JOSEPH F. DESMOND</b>, who also had one other daughter, <b>JOAN D. GASKINS</b>; Mr. Desmond and Mrs. Desmond also established on 10/15/1993 the <b>JOAN D. GASKINS IRREVOCABLE TRUST</b>; both trusts were created as part of his estate plan;</li> <li>Mr. Desmond made gifts to these trust and the trusts also acquired interests in two of Mr. Desmond's business entities (J.F Desmond Family Limited Partnership and Desmond Family Real Estate Limited Partnership);</li> <li>Petitioner has previously provided an accounting to <b>MARGARET A. HUGHES</b>, who is the present income beneficiary of the <b>HUGHES TRUST</b> and the only person to whom an account is required, and Petitioner has reviewed the accounting with her; Trustee desires to present his accounting for settlement and to provide copies and notice of the accounting to contingent trust beneficiaries;</li> <li>Exhibits II, III and IV together make up Petitioner's accounting of the <b>HUGHES TRUST</b> for the period from [10/15/1993] through 12/31/2011, as follows:</li> </ul>		<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <p>Page 9 through Page 15 are related cases.</p>																										
	<p><b>Account period: 10/15/1993 – 12/31/2008</b></p> <table> <tr><td>Accounting</td><td>-</td><td>\$760,548.28</td></tr> <tr><td>Beginning POH</td><td>-</td><td>\$ 7,978.00</td></tr> <tr><td>Ending POH</td><td>-</td><td>\$751,044.28</td></tr> </table> <p><b>Account period: 1/1/2009 – 12/31/2010</b></p> <table> <tr><td>Accounting</td><td>-</td><td>\$852,165.25</td></tr> <tr><td>Beginning POH</td><td>-</td><td>\$751,044.28</td></tr> <tr><td>Ending POH</td><td>-</td><td>\$768,186.03</td></tr> </table> <p><b>Account period: 1/1/2011 – 12/31/2011</b></p> <table> <tr><td>Accounting</td><td>-</td><td>\$987,777.27</td></tr> <tr><td>Beginning POH</td><td>-</td><td>\$768,186.03</td></tr> <tr><td>Ending POH</td><td>-</td><td>\$635,332.57</td></tr> </table> <p><b>Wherefore, Petitioner prays for an order of this Court:</b></p> <ol style="list-style-type: none"> <li>Settling, allowing and approving the account and report of Petitioner as Trustee as filed;</li> <li>Confirming and approving all acts and proceedings of Petitioner as Trustee.</li> </ol>			Accounting	-	\$760,548.28	Beginning POH	-	\$ 7,978.00	Ending POH	-	\$751,044.28	Accounting	-	\$852,165.25	Beginning POH	-	\$751,044.28	Ending POH	-	\$768,186.03	Accounting	-	\$987,777.27	Beginning POH	-	\$768,186.03	Ending POH	-
Accounting	-	\$760,548.28																											
Beginning POH	-	\$ 7,978.00																											
Ending POH	-	\$751,044.28																											
Accounting	-	\$852,165.25																											
Beginning POH	-	\$751,044.28																											
Ending POH	-	\$768,186.03																											
Accounting	-	\$987,777.27																											
Beginning POH	-	\$768,186.03																											
Ending POH	-	\$635,332.57																											
Cont. from			<p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 9/22/14</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 12 - Hughes</b></p>																										
Aff.Sub.Wit.																													
✓ Verified																													
Inventory																													
PTC																													
Not.Cred.																													
✓ Notice of Hrg																													
✓ Aff.Mail	W/																												
Aff.Pub.																													
Sp.Ntc.																													
✓ Pers.Serv.	W/																												
Conf. Screen																													
Letters																													
Duties/Supp																													
Objections																													
Video Receipt																													
CI Report																													
9202																													
✓ Order																													
Aff. Posting																													
Status Rpt																													
UCCJEA																													
Citation																													
FTB Notice																													



First Amended Account and Report of Conservator of Estate, Petition for Approval

		<b>CHARLOTTE A. YOUNG</b> , Daughter and Conservator without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b> 1. <b><u>Need amended accounting.</u></b> The Accounting as presented does not meet the requirements of Probate Code §§ 2620, 1060. <b><u>Issues include but are not limited to:</u></b> - Accounting does not balance - Beginning property on hand (POH) does not match the Inventory and Appraisal - Petitioner does not include most the required schedules (receipts, disbursements, POH) on Mandatory Judicial Council form - Petitioner does not provide account statements - Petitioner does not provide statements from the care home 2. <b>Need Notice of Hearing to interested parties</b> pursuant to Probate Code §§1460, 1461.5 (including to the Office of Veterans Administration). 3. <b>The Court does not authorize payments to non-attorney document services used by conservators in pro per from estate funds. <u>Any payments made to a document preparation service from the conservatorship estate should be refunded immediately.</u></b>  <b><u>Again, Petitioner is strongly encouraged to seek attorney assistance to prepare accountings.</u></b>
		Account period: 5-12-13 through 6-30-14	
Aff.Sub.Wit.		Accounting: ?? (An accounting is not provided in accordance with Probate Code §§ 2620, 1060.)	
Verified		Beginning POH: Not stated Ending POH: \$748.32	
Inventory		Conservator states she has paid Legal Tech \$200.00 and \$250.00 remains due.	
PTC		Conservator requests \$50.00/month for her reasonable services as conservator.	
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
			Reviewed by: skc
			Reviewed on: 9-22-14
			Updates:
			Recommendation:
			File 16 - Desmond

**Petition for Appointment of Guardian of the Person (Prob. C. 1510)**

<b>Age:</b> 11	<b><u>NO TEMPORARY REQUESTED</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>TANNER BEDWELL</b> , maternal uncle, and <b>JEANETTE BEDWELL</b> , maternal aunt, are petitioners.	1. Need Notice of Hearing.
<b>Cont. from</b>	Father: <b>ANTHONY GONZALES</b> , Declaration of Due Diligence filed on 09/09/2014	2. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>• Anthony Gonzales (Father) – Unless Court dispenses with notice.</li> </ul> <b>Note:</b> Declaration of Due Diligence filed 09/09/2014 states that she has never known or had contact with this person.
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Mother: <b>ERIKA C. PEAY</b> , Consents and Waives Notice	3. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>• Aurthur Gonzales, Sr. (Paternal Grandfather) – Unless the Court dispenses with notice.</li> </ul> <b>Note:</b> Declaration of Due Diligence filed 09/09/2014 states she has never had contact or known this person. <ul style="list-style-type: none"> <li>• Joni (Last name unknown) – Unless the Court dispenses with notice.</li> </ul> <b>Note:</b> Declaration of Due Diligence filed 09/09/2014 states she has never had contact or known this person. <ul style="list-style-type: none"> <li>• Robert Ringer (Maternal Grandfather) – Unless the Court dispenses with notice.</li> </ul> <b>Note:</b> Declaration of Due Diligence filed 09/09/2014 states the last contact the petitioner had with him was when she was nine years old. She has no information of where to locate him.
<input checked="" type="checkbox"/> <b>Verified</b>	Paternal Grandfather: Aurthur Gonzales, Sr., Declaration of Due Diligence filed 09/09/2014	
<input type="checkbox"/> <b>Inventory</b>	Paternal Grandmother: Joni (Last name unknown), Declaration of Due Diligence filed 09/09/2014	
<input type="checkbox"/> <b>PTC</b>	Maternal Grandfather: Robert Ringer, Declaration of Due Diligence filed 09/09/2014	
<input type="checkbox"/> <b>Not.Cred.</b>	Maternal Grandmother: Donna Ferrozzo, Consents and Waives Notice	
<input type="checkbox"/> <b>Notice of Hrg</b> <input checked="" type="checkbox"/>	<b>Petitioner states</b> the mother resides in Utah and is unable to provide the care needed. Petitioners are able to provide the child with a structured and stable home with boundaries that she needs. Petitioners state that the mother would like for the child to be in a place that is able to help her with her ADHD and the petitioners state they can help her.	
<input type="checkbox"/> <b>Aff.Mail</b> <input checked="" type="checkbox"/>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b> <input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/> <b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input checked="" type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>	<b>Court Investigator Samantha D. Henson's report filed 09/09/2014.</b>	
<input type="checkbox"/> <b>Aff. Posting</b>		<b>Reviewed by:</b> LV
<input type="checkbox"/> <b>Status Rpt</b>		<b>Reviewed on:</b> 09/22/2014
<input checked="" type="checkbox"/> <b>UCCJEA</b>		<b>Updates:</b>
<input type="checkbox"/> <b>Citation</b>		<b>Recommendation:</b>
<input type="checkbox"/> <b>FTB Notice</b>		<b>File 17 - Ringer</b>

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

Age: 4 months	<b>TEMPORARY EXPIRES 09/24/2014</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Notice of Hearing.  2. Petitioner states "None" when asked for the father's identity. Need clarification. Notice to the father is required. Need proof of service of Notice of Hearing with a copy of the petition on the father pursuant to Probate Code §2250(e) or declaration of due diligence or consent and waiver of notice. <b>Note:</b> Declaration of Due Diligence filed 08/04/2014 states that the father of the minor is unknown.  3. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>• Paternal Grandfather ( Not listed)</li> <li>• Paternal Grandmother (Not listed)</li> <li>• Maternal Grandfather (Not listed)</li> </ul> <b>Note:</b> Declaration of Due Diligence filed 08/04/2014 listing Khamla Chindapheth (Grandpa) states petitioner has no idea where he is at.
	<b>SYCHANH PHETCHUMPORN</b> , Aunt, is Petitioner.  Father: <b>"NONE" Declaration of Due Diligence filed 08/04/2014</b> Mother: <b>FANNIE CHINDAPHETH</b> - <i>Consents and waives notice</i>  Paternal Grandfather: "None" Paternal Grandmother: "None" Maternal Grandfather: "None" Maternal Grandmother: Khamphiane Chindapheth - <i>Consents and waives notice</i>  <b>Petitioner states</b> she feels the mother is under the influence of drugs and alcohol and is not capable of caring for the infant. The family is financially unstable. The infant needs to go to the doctor.  <b>Court Investigator Jennifer Daniel's report filed 09/12/2014</b>		
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg	x		
<input type="checkbox"/> Aff.Mail	x		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.	x		
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input checked="" type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input checked="" type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
<b>Reviewed by:</b> LV			
<b>Reviewed on:</b> 09/22/2014			
<b>Updates:</b>			
<b>Recommendation:</b>			
File 18 - Chindapheth			

Alex, 4	NORMA LEYVA, paternal grandmother, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
Julian, 3		
	CARESS GUTIERREZ, maternal aunt, was appointed guardian of the minors on 03/25/14.	This matter will be heard at 10:00am.
Cont. from 082814	Father: ALEX ORTIZ – served by mail on 07/20/14 Mother: SELINA GUTIERREZ – served by mail on 07/20/14	<b>CONTINUED FROM 08/28/14</b> Minute Order from 08/28/14 states: Loreta Gutierrez is also present. Guardian will continue to be the guardian with the minors staying with Ms. Leyva. Parties are to work together and get the children into school. The Court investigator is to do any investigation she finds appropriate including checking with CPS. Mediation today at 10:30.
Aff.Sub.Wit.		
✓ Verified	Paternal grandfather: PABLO ORTIZ	1. Need proof of service by mail of <i>Notice of Hearing</i> or <i>Consent &amp; Waiver of Notice</i> or <i>Declaration of Due Diligence</i> for: a. Pablo Ortiz (paternal grandfather)
Inventory		
PTC	Maternal grandfather: DECEASED Maternal grandmother: LORETTA GUTIERREZ – served by mail on 07/20/14	Reviewed by: JF
Not.Cred.		
✓ Notice of Hrg	<b>Petitioner states</b> the current guardian placed the children in her care on 06/20/14 due to the children not adjusting well. Guardian's son did not adjust well to having more children in his home and was hurting Alex, Jr. Fresno PD and CPS investigated and recommended that the children stay with petitioner or they would remove the children from guardian's home.	Reviewed on: 09/22/14
✓ Aff.Mail w/o		
Aff.Pub.	<b>Court Investigator Samantha Henson filed a report on 08/22/14.</b>	Updates:
Sp.Ntc.		
Pers.Serv.	<b>Court Investigator Samantha Henson filed a Supplemental Report on 09/12/14.</b>	Recommendation:
Conf. Screen		
Letters	9202	File 1A - Ortiz
Duties/Supp		
Objections	Order	
Video Receipt		
✓ CI Report	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

**Petition for Appointment of Guardian of the Person (Prob. C. 1510)**

Alex, 4	<b>NORMA LEYVA</b> , paternal grandmother, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>This matter will be heard at 10:00 am.</p> <p><b>CONTINUED FROM 08/28/14 Minute Order from 08/28/14 states:</b> Loreta Gutierrez is also present. Guardian will continue to be the guardian with the minors staying with Ms. Leyva. Parties are to work together and get the children into school. The Court investigator is to do any investigation she finds appropriate including checking with CPS. Mediation today at 10:30.</p> <p>1. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> <i>Consent &amp; Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for:</p> <p>a. Pablo Ortiz (paternal grandfather)</p> <p>b. Loretta Gutierrez (maternal grandmother)</p>
Julian, 3	<b>CARESS GUTIERREZ</b> , maternal aunt, was appointed guardian of the minors on 03/25/14.	
Cont. from 082814	Father: <b>ALEX ORTIZ</b> – <i>Consent &amp; Waiver of Notice</i> filed 06/26/14	
Aff.Sub.Wit.	Mother: <b>SELINA GUTIERREZ</b> – personally served on 06/26/14	
✓ Verified	Paternal grandfather: PABLO ORTIZ	
Inventory	Maternal grandfather: DECEASED	
PTC	Maternal grandmother: LORETTA GUTIERREZ	
Not.Cred.	<b>Petitioner states</b> the parents are unable to care for them and the current guardian's child was unable to handle sharing his mother and became abusive to the minors. The father is currently in rehab and the mother has not taken care of her criminal charges or her drug problem.	
✓ Notice of Hrg	<b>Court Investigator Samantha Henson filed a report on 08/22/14.</b>	
Aff.Mail	X	
Aff.Pub.	<b>Court Investigator Samantha Henson filed a Supplemental Report on 09/12/14.</b>	
Sp.Ntc.		
✓ Pers.Serv.	w/	
✓ Conf. Screen		
✓ Letters		
✓ Duties/Supp		
Objections		
Video Receipt		
✓ CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
✓ UCCJEA		
Citation		
FTB Notice		

**Reviewed by:** JF

**Reviewed on:** 09/22/14

**Updates:**

**Recommendation:**

**File 1B - Ortiz**