

Petition to Determine Interest in Real Property [Prob. C. 850(a)(2)(C)]

DOD: 2-26-01	ANNA N. FOSTER , daughter and Administrator with Limited IAEA with bond of \$100,000, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 081513		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	W	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters	5-11-07	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCC/JEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		

Petitioner states the Decedent died owning residential real property on E. Belgravia in Fresno, which property comprises the entirety of the estate. The Court confirmed sale of the property for \$51,000 on 3-4-13; however, the preliminary title report showed a Deed of Trust recorded 9-15-81 (Exhibit 1). The beneficial interest in the Deed of Trust was subsequently assigned by mesne assignment to Charles W. Dean and Leroy H. (Mike) Todd, as trustees of the Dean-Todd Trust dated 4-19-85. Notwithstanding the report, Petitioner is informed and believes that the property was owned free and clear of all liens and alleges that a reconveyance was received by the Decedent. However, Petitioner cannot locate it, and it was never recorded.

Fearing the buyers will be lost and the estate irreparably harmed, Petitioner filed an ex parte application for order clearing title. The Court ordered the property to be sold free and clear of the Deed of Trust but the net proceeds were to be impounded with the Court pending determination of any other person's interest to the Deed of Trust.

Escrow closed on 6-28-13 and net proceeds of \$39,968.64 were impounded with the Fresno County Clerk of the Court on 5-30-13.

Petitioner states prior to seeking the court order referenced above, Suzanne Carroll, a paralegal at the estate's attorney's office, undertook an heir search to locate Dean, Todd, or any of their heirs. See declaration. Both Dean and Todd are deceased and there is no record of any proceeding regarding the trust. Without have the terms of the trust, it is impossible to know whether there are any remainder beneficiaries.

Petitioner brings this petition to claim the full amount of the net proceeds and to provide notice and an opportunity for anyone who may have a beneficial interest in the Deed of Trust to object.

Petitioner provides a list of person known by Petitioner who may have an interest, by way of inheritance, or are otherwise entitled to notice. The Court also authorized notice by publication to any unknown persons who may be an interested party. Notice was published in the Fresno Business Journal. See Declaration of Publication filed 8-16-13.

Petitioner prays this Court order that the entire net proceeds from the sale in the amount of \$39,968.64 are determined to be the property of the estate, and for all other orders the Court deems just and proper.

Reviewed by: skc
Reviewed on: 9-24-13
Updates:
Recommendation:
File 1 – Foster

**Third Account and Report by Bruce D. Bickel, Trustee; Petition for Settlement;
 Approval and Allowance of Trustee's and Attorneys' Fees [Prob. C. 1060,
 17200(a)(5)]**

		BRUCE D. BICKEL , Trustee, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. The Court may require clarification regarding the various household expenses being paid from the trust.</p> <p>When the last account was settled, the Court authorized payment to Mr. Castillo's niece, Victoria Garcia, who resides with him and provides 24-hour care, of up to \$4,896/month, to supplement the income she receives from IHSS as his caregiver. Ms. Garcia's husband also assists with the care.</p> <p>Disbursements schedule also indicates payments of for cable TV, City of Fresno utilities, and PGE.</p> <p>The Court may require clarification regarding whether the Special Needs Trust is paying for the entirety of the household TV and utilities, or whether the amounts disbursed are for the beneficiary's portion of those bills, based on the number of adults in the household.</p> <p><u>Note:</u> Aside from the above disbursements, there were no specific disbursements during this account period for the benefit of the beneficiary.</p> <p>Reviewed by: skc Reviewed on: 9-24-13 Updates: Recommendation: File 2 – Castillo</p>
		Account period: 10-1-10 through 9-30-12	
		Accounting: \$334,334.21	
		Beginning POH: \$283,764.70	
		Ending POH: \$215,114.33	
	Aff.Sub.Wit.	(\$46,230.30 cash plus mutual fund accounts, personal property)	
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.	Trustee: \$9,519.00 (per declaration, at reduced rate of \$150)	
✓	Notice of Hrg		
✓	Aff.Mail	Attorney: \$2,920.50	
	Aff.Pub.		
	Sp.Ntc.	Costs: \$200.00 (filing)	
	Pers.Serv.		
	Conf. Screen	Bond: \$393,454.61 (sufficient)	
	Letters	Petitioner prays for an order:	
	Duties/Supp	1. Approving, allowing, and settling the Third Account and Report;	
	Objections	2. Approving all acts and transactions of the Trustee shown by this Third Account and Report;	
	Video Receipt	3. Authorizing payment to the Trustee of \$9,519.00;	
	CI Report	4. Authorizing payment to the Attorney of \$2,920.50 plus \$200.00 in costs;	
	9202	5. For such further orders as are proper.	
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

(1) Report of Executor and Petition for Allowance of Statutory Fees and Reimbursement of Costs, and (2) for Final Distribution on Waiver of Accounting [Prob. C. 10831, 10954 & 11640]

DOD: 7/3/2010		SCOTT MOMMER , Executor, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Accounting is waived.	
		I & A - \$498,472.42	
Cont. from		POH - \$607,864.53	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Attorney (statutory) - \$12,969.45	
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC	Executor (statutory) - \$12,969.45	
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Costs - \$1,702.50 (filing fees, certified copies, probate referee, publication)	
<input checked="" type="checkbox"/>	Aff.Mail	W/	
<input type="checkbox"/>	Aff.Pub.	Closing reserve - \$10,000.00	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen	Distribution, pursuant to Decedent's Will, is to:	
<input checked="" type="checkbox"/>	Letters	9/14/10	
<input type="checkbox"/>	Duties/Supp	Marla Papagni - \$72,407.71, Time share residence and 1/3 interest in 2 parcels of real property located in Fresno County	
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report	Scott Mommer - \$72,407.71, and 1/3 interest in 2 parcels of real property located in Fresno County	
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting	Tara Humberstone - \$72,407.71, and 1/3 interest in 2 parcels of real property located in Fresno County	
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 9/24/13
			Updates:
			Recommendation: SUBMITTED
			File 3 – Mommer

(1) Waiver of Accounting and (2) Petition for Final Distribution under Will and (3) For Allowance of Fees to Attorney

DOD: 4/6/12	REBECCA FINDERUP , Executor, is petitioner.		NEEDS/PROBLEMS/COMMENTS:
	Accounting is waived.		<ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service of the Notice of Hearing on: <ol style="list-style-type: none"> a. Jeffrey Bodmer b. Steven Bodmer 3. Order does not comply with Local Rule 7.6.1F. Some portion of the content of the order must appear on the page upon which the judge's signature is affixed.
	I & A	- \$237,674.85	
	POH	- \$253,854.68	
Cont. from	Executor	- waives	
<input type="checkbox"/> Aff.Sub.Wit.	Attorney (statutory)	- \$7,753.49	
<input checked="" type="checkbox"/> Verified	Closing reserve	- \$2,500.00	
<input checked="" type="checkbox"/> Inventory	Distribution, pursuant to Decedent's Will, is to:		
<input checked="" type="checkbox"/> PTC	Rebecca Finderup	- \$81,200.30	
<input checked="" type="checkbox"/> Not.Cred.	and 1/3 interest in personal property.		
<input type="checkbox"/> Notice of Hrg	Jeffrey Bodmer	- \$81,200.30	
<input type="checkbox"/> Aff.Mail	and 1/3 interest in personal property.		
<input type="checkbox"/> Aff.Pub.	Steven Bodmer	- \$81,200.30	
<input type="checkbox"/> Sp.Ntc.	and 1/3 interest in personal property.		
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters	7/30/12		
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input checked="" type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input checked="" type="checkbox"/> FTB Notice			
			Reviewed by: KT
			Reviewed on: 9/24/13
			Updates:
			Recommendation:
			File 4 – Bodmer

Petition for Substituted Judgment to Create and Execute a Will

Age: 64	BEVERLY HALL , conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Petitioner states:	<u>CONTINUED FROM 08/22/13</u>
	1. This Petition is brought to avoid intestate succession and provide meaningful and orderly distribution of the estate of the conservatee upon her death.	Minute Order from 08/22/13 states:
	2. The conservatee is not opposed to the proposed action, but lacks capacity for the proposed action and lacks legal capacity to state a position as to the proposed action.	Matter continued to 09/30/13 for counsel to re-notice the parties.
Cont. from 082213	3. As far as Petitioner and all of the conservatee's other siblings know, the conservatee does not have any estate planning documents in place in which to provide for distribution of her estate. As such, her estate would be subject to the laws of intestate succession. Although the conservatee has 3 children, they have been estranged for years and there has been no contact between them since the estrangement. Petitioner believes that if the conservatee were capable of executing estate planning instruments, she would not provide for her children and would exclude them from the distribution of her estate. As more fully set forth in the attached declarations of Mary P. Hildreth, Karen Ramey, and Derrick Leslie, circumstances show that the conservatee, as a reasonably prudent person, would take the proposed action if she had the capacity to do so.	Note: Notice of Hearing with a copy of the Petition was sent to the conservatee's 3 children only and not to all persons who were provided Notice of Hearing previously without a copy of the Petition. It is noted that three of the persons (Mary Hildreth, Karen Ramey, and Derrick Leslie (sisters and brother)) executed declarations in support of the Petition. The only other person who did not receive a copy of the Petition is Nellie Pittman, conservatee's mother.
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail w/		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice	4. When Petitioner began conservatorship proceedings at the beginning of the year, notice was sent to conservatee's children. To date, none of her children have made inquiry or contact with Petitioner, or her attorney, about the conservatee's care or condition.	
	Continued on Page 2	Reviewed by: JF
		Reviewed on: 09/24/13
		Updates:
		Recommendation:
		File 5 - Dhooghe

Petitioner prays for an Order:

1. Authorizing and directing Beverly Hall, as Conservator of the estate of Christine Dhooghe, to execute the Will attached as Exhibit "A" to this petition on behalf of Christine Dhooghe under Probate Code § 2580(b)(13).

Note: The attached Will proposes to leave the conservatee's tangible personal property in equal shares to her siblings and the residue of her estate to Beverly Hall if she survives the conservatee or her surviving siblings if Beverly Hall does not survive her.

	DAVID C. DUNGY , Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 1-1-07 through 11-1-12	Continued from 8-19-13
	Accounting: \$ 225,375.69	Minute Order 8-19-13: Ms. De Caro advises the Court that she has some questions regarding this matter and would like an opportunity to retain counsel. Ms. De Caro requests a continuance. Continued to 9/30/13 @ 9:00 a.m. Dept. 303
	Beginning POH: \$ 0.00	
	Ending POH: \$ 0.00	Note: The order in the file was marked up at the last hearing; therefore, if granted, a new order is needed.
Cont. from 081913	Petitioner states the trustee has reimbursed himself out of pocket expenses but otherwise has not received or taken any compensation.	
<input type="checkbox"/> Aff.Sub.Wit.	Petitioner requests that:	
<input checked="" type="checkbox"/> Verified	1. The account be settled, allowed, and approved, and all acts and transactions of Petitioner be ratified, confirmed, and approved;	
<input type="checkbox"/> Inventory	2. The trust be terminated; and	
<input type="checkbox"/> PTC	3. Such other and further orders as the Court may deem proper under the circumstances.	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail w		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: skc
		Reviewed on: 9-24-13
		Updates:
		Recommendation:
		File 6 – De Caro

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 04/30/2013		<p>MARGUERITE HUGHES, niece is petitioner and requests appointment as Administrator with will annexed with bond set at \$550,000.00.</p> <p>Full IAEA - ?</p> <p>Will dated: 08/19/2000</p> <p>Residence: Reedley Publication: NEED</p> <p>Estimated value of the Estate: Personal property \$550,000.00</p> <p>Probate Referee: Steven Diebert</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need original will to be deposited with the Court pursuant to Probate Code §8200(a)(1). 2. Will is not self-proving. Need proof of Subscribing Witness. 3. Need Affidavit of Publication. 4. Need Notice of Petition to Administer Estate. 5. Need proof of service of Petition to Administer Estate on all entitled to service. 6. Need Confidential Supplement to Duties & Liabilities of Personal Representatives. 7. Need Order. 8. Need Letters. <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Friday, 11/01/2013 at 9:00a.m. in Dept. 303 for the filing of the bond <u>and</u> Friday, 03/07/2014 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Friday, 12/05/2014 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/> Verified	<input type="checkbox"/>		
<input type="checkbox"/> Inventory	<input type="checkbox"/>		
<input type="checkbox"/> PTC	<input type="checkbox"/>		
<input type="checkbox"/> Not.Cred.	<input type="checkbox"/>		
<input type="checkbox"/> Notice of Hrg	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Aff.Mail	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Aff.Pub.	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Sp.Ntc.	<input type="checkbox"/>		
<input type="checkbox"/> Pers.Serv.	<input type="checkbox"/>		
<input type="checkbox"/> Conf. Screen	<input type="checkbox"/>		
<input type="checkbox"/> Letters	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/> Duties/Supp	<input type="checkbox"/>		
<input type="checkbox"/> Objections	<input type="checkbox"/>		
<input type="checkbox"/> Video Receipt	<input type="checkbox"/>		
<input type="checkbox"/> CI Report	<input type="checkbox"/>		
<input type="checkbox"/> 9202	<input type="checkbox"/>		
<input type="checkbox"/> Order	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Aff. Posting	<input type="checkbox"/>		
<input type="checkbox"/> Status Rpt	<input type="checkbox"/>		
<input type="checkbox"/> UCCJEA	<input type="checkbox"/>		
<input type="checkbox"/> Citation	<input type="checkbox"/>		
<input type="checkbox"/> FTB Notice	<input type="checkbox"/>		
Reviewed by: LV			
Reviewed on: 09/24/2013			
Updates:			
Recommendation:			
File 7 – Peters			

DOD: 01/17/2010		GEORGE C. HAMPARSON, II, son/named executor without bond, is petitioner. Full IAEA - ? Will dated: 05/31/1991 Codicil: 03/09/2006 Residence: Fresno Publication: Need Estimated value of the Estate: Personal property \$303,000.00 Probate Referee: Rick Smith	NEEDS/PROBLEMS/COMMENTS: <u>Continued to 10/23/2013 at the request of the Attorney</u> 1. Need Notice of Petition to Administer Estate. 2. Need proof of service of the Notice of Petition to Administer Estate on the Trustee of the George C. and Anita M. Hamparson Trust. 3. Need proof of service of Notice of Petition to Administer Estates on: <ul style="list-style-type: none"> • Florence Elaine Hamparson • Robert W. Williams, Jr. • Verda E. Hamparson Pursuant to Probate Code §8110(b). 4. Need Affidavit of Publication. Note: If the petition is granted status hearings will be set as follows: <ul style="list-style-type: none"> • Friday, 03/07/2014 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Friday, 12/05/2014 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
Cont. from			
Aff.Sub.Wit.	s/p		
✓ Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg	x		
Aff.Mail	x		
Aff.Pub.	x		
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: LV			
Reviewed on: 09/24/2013			
Updates: 09/25/2013			
Recommendation:			
File 8 – Hamparson			

Jade (13)	<p>TEMP EXPIRES 8-12-13</p> <p>ARIANNA MANCERA, Maternal Aunt, is Petitioner and requests appointment of LORRAINE MANCERA and DIANE MANCERA, Maternal Aunts, as Co-Guardians.</p> <p>Father (Jade): MODESTO BULOSAN - Notice dispensed 8-12-13</p> <p>Father (Ramon and Samuel): UNKNOWN - Notice dispensed 8-12-13</p> <p>Mother: DIAMONDINE PAULA MANCERA BULOSAN</p> <p>Paternal Grandfather (Jade): Unknown Paternal Grandmother (Jade): Unknown</p> <p>Paternal Grandfather (Ramon and Samuel): Unknown Paternal Grandmother (Ramon and Samuel): Unknown</p> <p>Maternal Grandfather: Unknown Maternal Grandmother: Maria Paz Mancera - Deceased</p> <p>Petitioner states Jade was under guardianship with the maternal grandmother since she was 11 months old; however, the guardian passed away three years ago, and the family did not know that they should notify the Court. The mother also recently turned over Jade's half-brothers Samuel and Ramon to a family member stating that she could not care for them. The family member picked them up from what he believes was a crack house. The mother told him she was homeless. He brought them to the mother's sisters, since they have been caring for Jade and are the best people to care for the boys as well. The family is fearful that the mother will attempt to remove the children from their care – they were brought to the family filthy and hungry with matted hair and smelling of urine, ill-fitting clothes and no shoes.</p> <p>Court Investigator Jo Ann Morris filed a report on 8-2-13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 8-12-13</p> <p>Minute Order 8-12-13: The Court dispenses with further notice to Jade's father in that he is believed to no longer be in the United States. The Court dispenses with further notice to Ramon and Samuel's father. The Court directs the Petitioner to provide notice to mother and cure the remaining defects listed in the examiner notes. Matter is continued to 9/30/13 at which time the fee waiver(s) will be addressed by the Court. The temporary is extended to 9/30/13. Continued to 9/30/13 at 9:00am in Dept. 303. Temp Letters extended to 9/30/13.</p> <p>As of 9-24-13, nothing further has been filed. The following issues remain:</p> <p style="text-align: center;"><u>SEE PAGE 2</u></p>
Ramon (2)		
Samuel (1)		
Cont. from 081213		
Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg <input checked="" type="checkbox"/>		
Aff.Mail <input checked="" type="checkbox"/>		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv. <input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
Objections		
Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> Clearances		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA <input checked="" type="checkbox"/>		
Citation		
FTB Notice		

Page 2

NEEDS/PROBLEMS/COMMENTS:

1. **Need clarification:** Arianna Mancera is the Petitioner in this case, rather than the proposed guardians Lorraine Mancera and Diane Mancera. As a relative, Arianna can file this petition under Probate Code § 1510, but she is not otherwise a party to the case. Examiner notes that for Court fees to be waived, all petitioners must qualify. The Court may require clarification or separate requests for fee waivers from the proposed guardians, or payment of fees.
2. **Need UCCJEA (Form GC-120) per Probate Code §§ 1510(f), 1512** containing residence history for each minor for the past 5 years as well as information regarding other cases.
3. **Need Notice of Hearing.**
4. **Need proof of personal service of Notice of Hearing with a copy of the Petition at least 15 days prior to the hearing per §1511 or consent and waiver of notice or declaration of due diligence on:**
 - Jade Bulosan (minor, age 13)
 - Diamondline Paula Mancera Bulosan (mother)
5. **Need proof of service of Notice of Hearing with a copy of the Petition at least 15 days prior to the hearing per §1511 or consent and waiver of notice or declaration of due diligence on:**
 - Jade's paternal grandparents
 - Roman and Samuel's paternal grandparents
 - Maternal grandfather

Petition for Visitation

Age: 6 years		MARIA BAUTISTA , paternal grandmother, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service of the <i>Notice of Hearing</i> on: <ol style="list-style-type: none"> a. Felipe E. Bautista (father) b. Vanessa Nicole Noriega (mother) c. Antonio Bautista (paternal grandfather) d. Victor Manuel Noriega (maternal grandfather) e. Kathy Ann Noriega (maternal grandmother)
		MARIA BAUTISTA was appointed Guardian on 5/8/06.	
Cont. from		Father: FELIPE E. BAUTISTA ,	
<input type="checkbox"/>	Aff.Sub.Wit.	Mother: VANESSA NICOLE NORIEGA	
<input checked="" type="checkbox"/>	Verified	Paternal grandfather: Antonio Bautista	
<input type="checkbox"/>	Inventory	Maternal grandfather: Victor Manuel Noriega	
<input type="checkbox"/>	PTC	Maternal Grandmother: Kathy Ann Noriega	
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Aff.Mail	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
<p>Current visitation order per Minute Order dated 05/08/2012:</p> <p>Father, Felipe E. Bautista, shall have no unsupervised visits with the child. Visitation with father shall be supervised by either the paternal grandfather or the paternal step-grandmother. Additionally, there shall be no unsupervised visits around the father's wife.</p> <p>Petitioner requests: that father's visits be supervised for the minor's own protection. The minor informed the guardian that he goes to his father's home and his wife is present. The child comes home crying saying that the father's wife hits him, yells at him, makes him clean the entire house and mistreats him. The minor says that he gets hit with the belt by his father for no reason. The minor informed the petitioner that he is afraid to go to the father's home because his father and the wife argue all of the time. Petitioner states that the father does not comply with the court order regarding no unsupervised visits around his wife. The paternal grandfather and the paternal step-grandmother are to be supervising the visits however the paternal grandfather passed away.</p>			<p>Reviewed by: LV</p> <p>Reviewed on: 09/24/2013</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 10 – Bautista</p>

DOD: 4/12/2007		EVEYLN S. DUARTE, Executor, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Accounting is waived.	The deficiencies with the pleadings include, but are not limited to, the following:
Cont. from		I & A - \$155,000.00	<ol style="list-style-type: none"> 1. Petition for final distribution was filed using a fee waiver. Filing fees are considered a cost of administration and must be paid prior to distribution of assets. Therefore a filing fee of \$435.00 is now due. 2. Need Notice of Hearing. 3. Need proof of service of the Notice of Hearing on: <ol style="list-style-type: none"> a. Lila Holguin b. Melissa Romero 4. Petition was not verified. Probate Code §1021. 5. Petition does not comply with California Rules of Court 7.550 for a waiver of account. 6. Petition does not include a proposed distribution. 7. Petition indicates that the creditors have not been satisfied. Therefore the estate is not in a condition to close. 8. Petition indicates there are back taxes owing. Therefore the estate is not in a condition to close. 9. Petitioner was formerly represented by Attorney Jill Spaulding. Attorney Spaulding would be entitled to statutory fees.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 9/24/2013
			Updates:
			Recommendation:
			File 11 – Flores

Atty Wright, Melissa (pro per Petitioner/Guardian)

Petition for Termination of Guardianship

Jazmine age: 11	MELISSA WRIGHT, guardian, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Although Petitioner has filed a Petition to terminate the guardianship what she is actually requesting is to have the co-guardian Shannon Wright removed.</p> <p>Court Investigator Jennifer Young to provide:</p> <ol style="list-style-type: none"> Court Investigator's Report
Gilbert age: 10	SHANNON WRIGHT, paternal uncle, and MELISSA WRIGHT, paternal aunt, were appointed guardians on 3/18/2010.	
Destiny age: 8	Father: GILBERT WRIGHT – deceased.	
Cont. from	Mother: ANGELA CHAVEZ	
<input type="checkbox"/> Aff.Sub.Wit.	Paternal grandfather: Shannon Wright	
<input checked="" type="checkbox"/> Verified	Paternal grandmother: Gladys Wright	
<input type="checkbox"/> Inventory	Maternal grandfather: Ray Chavez	
<input type="checkbox"/> PTC	Maternal grandmother: Jeanie Caldwell	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Petitioner is requesting Shannon Wright be removed as guardian of the children. Ms. Wright states Mr. Wright has not had any contact with the children since August 2010 when she was granted a Domestic Violence Restraining Order protecting her and the children from Mr. Wright. The Restraining Order expires in October 2013. Ms. Wright fees that removing Mr. Wright as guardian of the children is in the children's best interest, because of his extensive and on-going drug use and criminal history.	
<input checked="" type="checkbox"/> Aff.Mail	W/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 9/24/13
		Updates:
		Recommendation:
		File 12 – Chavez & Wright

Atty Wright, Sandra Kelly (Pro Per – Maternal Grandmother – Petitioner)
Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Jaedyn, age 2		TEMP EXPIRES 9-30-13	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Petition pertains to minor Jaedyn only. Petitioner was appointed guardianship of minor Noah 11-19-12.</p> <ol style="list-style-type: none"> Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing pursuant to Probate Code §1511 or consent and waiver of notice or declaration of due diligence on: - Karissa Wright (Mother) <p><u>Note:</u> Petitioner mailed Notice of Hearing to the mother at Petitioner's address in Clovis; however, notice is deficient. Probate Code requires personal service, and the mother does not reside at Petitioner's address (Petitioner states the mother moved to Auberry).</p> <ol style="list-style-type: none"> Petitioner filed a declaration of due diligence for Jonathan Hewitt (Father). If diligence is not found, need proof of personal service pursuant to Probate Code §1511. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing pursuant to Probate Code §1511 or consent and waiver of notice or declaration of due diligence on: - Kenneth Wright (Maternal Grandfather) - Paternal Grandfather - Paternal Grandmother
		<p>SANDRA KELLY WRIGHT, maternal grandmother, is petitioner.</p> <p>Father: JONATHAN HEWITT, Declaration of Due Diligence filed on 07/30/2013</p> <p>Mother: KARISSA WRIGHT</p> <p>Paternal Grandparents: Unknown</p> <p>Maternal Grandfather: Kenneth Wright</p> <p>Petitioner states: On 6-21-13 the mother checked into a mental facility after three or four days she checked out with another patient and moved to Auberry. She left the child with the petitioner. Petitioner states the mother is doing drugs.</p> <p>Court Investigator Samantha Henson filed a report on 9-23-13.</p>	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
Reviewed by: skc			
Reviewed on: 9-24-13			
Updates:			
Recommendation:			
File 13 – Gable-Wright			

Amended Petition to Determine Succession to Real Property

DOD: 12/30/2011	ABRAHAM ISAAC TUBBS, Jr., Sons is Petitioner.	NEEDS/PROBLEMS/COMMENTS: Continued from 8/30/13. Minute order states examiner notes are provided to the Petitioner. As of 9/24/13 the following issues remain: 1. Petition was filed using a fee waiver. Costs of administration must be paid prior to property passing to the decedent's heirs. Therefore, the filing fee of \$435.00 must be paid to the Court prior to the signing an order to pass the property. 2. Petition must be joined in by all who succeed to the property. Therefore based on previously filed petitions, Jesse R. Tubbs, son, must also be a petitioner. 3. Inventory and Appraisal is incomplete at 3 – 5. It does not indicate whether or not this is all or a portion of the property that has come to Petitioner's knowledge or possession. And whether or not a property tax certificate has been completed. 4. Need Notice of Hearing. 5. Need proof of service on Petition to Determine Succession to Real Property. 6. Need attachment 14 to the petition listing all heirs who will take under intestacy. 7. Order is incomplete (completely blank at items 1 - 11). Need completed order. Reviewed by: KT Reviewed on: 9/24/2013 Updates: Recommendation: File 14 - Tubbs
	40 days since DOD	
	No other proceedings	
Cont. from 082913	I&A: \$45,000.00	
<input type="checkbox"/> Aff.Sub.Wit.	Decedent died intestate	
<input checked="" type="checkbox"/> Verified	Petitioner requests Court determination that Decedent's real property pass to Abraham Isaac Tubbs, Jr. and Jesse R. Tubbs in equal shares pursuant to intestate succession.	
<input checked="" type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	x	
<input type="checkbox"/> Aff.Mail	x	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		

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

Age: 14 years	<p style="text-align: center;">There is no temporary. No temporary was requested.</p> <p>GRAZIELA SAUCEDA, paternal grandmother, is petitioner.</p> <p>Father: WILLIAM ANTHONY SANTOS</p> <p>Mother: VIVA GARCIA – Declaration of Due Diligence filed on 7/29/13.</p> <p>Paternal grandfather: not listed Maternal grandfather: not listed Maternal grandmother: Maggie Velez</p> <p>Petitioner states Petitioner states the minor needs to stay with her or she will not be able to go to school.</p> <p>Court Investigator Samantha Henson's Report filed on 9/23/13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Petitioner previously filed a petition to be appointed guardian. At the hearing on 5/13/13 the petitioner did not appear. Margarita Velez appeared and stated the Petitioner no longer wanted to proceed with the guardianship and the Petition was denied.</p> <ol style="list-style-type: none"> 1. Petition does not include the names and addresses of the paternal grandfather and the maternal grandfather. 2. Need proof of <u>personal</u> service of the Notice of Hearing along with a copy of the Petition, or Consent and Waiver of Notice, or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. William Anthony Santos (father) b. Viva Garcia (mother) – unless the court dispenses with notice. c. Abrina N. Santos (minor) 3. Need proof of service of the Notice of Hearing along with a copy of the Petition, or Consent and Waiver of Notice, or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. Paternal grandfather b. Maternal grandfather c. Maggie Velez (maternal grandmother) 4. UCCJEA is incomplete. Need residence information for the minor for 2007 – 12/2012.
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		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
Reviewed by: KT		
Reviewed on: 9/25/13		
Updates:		
Recommendation:		
File 15 – Santos		

Amended Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 2-6-12		MARK B. HOLBROOK , son, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Notice to Shelley Docimo was sent "c/o" Wendy Tibbett. Probate Code and Cal. Rules of Court 7.51 require <u>direct</u> notice. The Court may require continuance for proper notice.	
		40 days since DOD		
		No other proceedings		
	Aff.Sub.Wit.	I&A: \$55,000.00		
	Verified			
✓	Inventory	Will dated 12/20/08 devises the residence located at 806 West Terrace, Fresno, Ca. to Mark Holbrook.		
	PTC			
	Not.Cred.			
✓	Notice of Hrg	Petitioner requests Court determination that decedent's 100% interest in real property located at 806 West Terrace, Fresno, Ca. passes to Petitioner pursuant to decedent's will.		
✓	Aff.Mail	w		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
				Reviewed by: skc
				Reviewed on: 9-24-13
			Updates:	
			Recommendation:	
			File 16 – Ellis	

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

Age: 9 years		<u>TEMPORARY EXPIRES ON 9/30/2013</u>		NEEDS/PROBLEMS/COMMENTS:	
		ANTONIO GARCIA , step-father, is petitioner.		1. Need proof of service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: a. Natalia Sosa (paternal grandmother)	
		Father: JUVENTINO CHAVEZ – consents and waives notice.			
Cont. from 090913		Mother: JULIA PATRICIA RAMIREZ – personally served on 8/13/13.			
	Aff.Sub.Wit.				
✓	Verified				
	Inventory				
	PTC				
	Not.Cred.				
	Notice of Hrg	X			
	Aff.Mail	X			
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.	X			
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
✓	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
				Reviewed by: KT	
				Reviewed on: 9/24/2013	
				Updates:	
				Recommendation:	
				File 17 – Ramirez	

Petition for Appointment of Temporary Guardian of the Person

Age: 3	TEMP GRANTED EX PARTE EXPIRES 9-30-13	NEEDS/PROBLEMS/COMMENTS:
	GENERAL HEARING 11-18-13	<u>Notes:</u>
	ATHENA HOWARD, Maternal Aunt, is Petitioner.	<ul style="list-style-type: none"> Petitioner resides in Visalia, CA (Tulare County) with the minor. The minor previously resided with the parents in Fresno. The pending Family Law dissolution case is Fresno Superior Court Case No. 13CEFL04969. The pending domestic violence restraining order was filed within the dissolution case 13CEFL04969.
Aff.Sub.Wit.	Father: ALFRED G. ESPINOZA	
✓ Verified	Mother: ARIELLE A. SORENSEN-ESPINOZA - Personally served 9-17-13	
Inventory	Paternal Grandfather: Fred Espinoza Paternal Grandmother: Auroa Garcia	
PTC	Maternal Grandfather: Peter Sorenson Maternal Grandmother: Janette Freeman	
Not.Cred.		
✓ Notice of Hrg		
✓ Aff.Mail		
Aff.Pub.		1. The mother filed for dissolution of marriage, as well as a domestic violence restraining order and custody of the minor on 9-11-13 and the DVTRO and temporary custody were granted on 9-12-13. A hearing on the DVTRO and temporary custody request is scheduled for 10-4-13 in Dept. 304.
Sp.Ntc.		
✓ Pers.Serv.		
✓ Conf. Screen	Petitioner states the minor has been abused by her father. See details in petition.	Therefore, the Court may require further clarification for this Probate Guardianship case with reference to Local Rule 7.15.7 and the <u>presently pending</u> family law matter.
✓ Letters		
✓ Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
✓ Order		2. Petitioner requests to be excused from giving notice to the father. If notice is not excused, need proof of service pursuant to Probate Code §2250(e).
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 9-25-13
✓ UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 18 – Espinoza