



## Thursday, October 6, 2016

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**The Probate Examiner's Office recommends approval of the following Probate matters:**

20	16CEPR00765	Margaret Lusk (Det. Succ)
23	16CEPR00892	Stanley Lloyd Kiespert (Estate)
25	16CEPR00905	Richard C. Darby, JR (Estate)
26	15CEPR01135	Albert Gomonet (Estate)

**The following Probate matters have been continued at the request of the Petitioner or the Petitioner's attorney:**

None

**The following Probate matters have been taken off calendar:**

7	15CEPR00257	Francisco Javier Gonzalez (GUARD/E)
10	15CEPR00660	Olive Naomi Pierce (Estate)

**Appearance of counsel is recommended for all remaining Probate matters set for hearing. Thank you.**

Dept. 303, 9:00 a.m. Thursday, October 6, 2016

Petitioner: Elizabeth Hernandez (pro per)

Petition for Appointment of Guardian of the Person

		THERE IS NO TEMPORARY. No temporary was requested.	NEEDS/PROBLEMS/COMMENTS:
		ELIZABETH HERNANDEZ, maternal aunt, is petitioner.	<ol style="list-style-type: none"> <li>1. Need Notice of Hearing.</li> <li>2. Need proof of personal service of the Notice of Hearing along with a copy of the petition or consent and waiver of notice on:                             <ol style="list-style-type: none"> <li>a. Josephine Torres (mother)</li> <li>b. Albert Torres (minor)</li> <li>c. Unknown father</li> </ol> </li> <li>3. Need proof of service of the Notice of Hearing along with a copy of the petition or consent and waiver of notice on:                             <ol style="list-style-type: none"> <li>a. Unknown paternal grandparents.</li> </ol> </li> </ol>
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		
			Reviewed by: KT
			Reviewed on: 9/30/16
			Updates:
			Recommendation:
			File 1- Torres

Status RE: Filing of the First or Final Account

<b>DOD: 11/28/11</b>	<p><b>ANDY WARMERDAM</b>, Son, was appointed Executor with Full IAEA without bond and Letters issued on 8/6/15.</p> <p>At the hearing on 8/6/15, the Court set this status hearing for the filing of the first account or petition for final distribution.</p> <p><b>Status Report filed on 10/5/16</b> states during the course of the administration, it was discovered that the decedent had made loans to a family member, son of which may have been secured by a deed of trust. Efforts to resolve the matter failed. A Petition for Approval of Acts of Personal Representative; for Payment of Attorney Fees Concurrent with Litigation was approved on 9/28/16.</p> <p>For the above reasons the estate is not in a condition to close.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note: On 9/28/16, the Court approved the Executor's Petition for Approval of Acts of Personal Representative; for Payment of Attorney Fees Concurrent with Litigation, which authorized Executor to pursue litigation against a debtor.</b></p> <p><b>1. Need First Account or Petition for Final Distribution pursuant to Probate Code §12200</b></p>
<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> skc</p> <p><b>Reviewed on:</b> 9/28/16</p> <p><b>Updates:</b> 10/5/16 (KT)</p> <p><b>Recommendation:</b></p> <p><b>File 2- Warmerdam</b></p>	

Petition for Termination of Conservatorship of the Estate Due to Lack of Assets and  
Petition for Attorney s Fees to Be Paid By Trustee of the Sylvia Nadine Webb Living Trust

		<p><b>RONALD WEBB and JEANINE LUTTRELL</b>, Son and Daughter and Co-Conservators of the Person and Estate with bond of \$150,785.00, are Petitioners.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
<b>Cont. from 090116</b>		<p><b>Petitioners state</b> the I&amp;A was filed 8/23/13 showing no assets in the conservatorship estate. After Petitioners were appointed conservators of the estate, it was determined that all of the assets were held in the Sylvia Nadine Webb Living Trust and there were no assets to be placed in the conservatorship. There is no need for a conservatorship of the estate nor a bond for \$150,785.00; therefore, the conservatorship of the estate should be terminated and the surety discharged.</p>	<p><b>Minute Order 9/1/16: No appearances; continued to 10/6/16.</b></p>
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>	<p>Attorney LeVan has represented Petitioners/Co-Conservators since 2/22/13 and requests compensation for legal services related to the conservatorship in the amount of <b>\$3,314.00</b>. Itemization at Exhibit A includes preparation and service of documents, appearance at hearings, review of documents and bank statements, and costs.</p>	<p><b>The following issues remain noted:</b></p>
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>	<p>1. <b>The Court may require further information re the trust. When was the trust created? What actions taken by the Conservators to determine the status of the assets as trust assets? –</b></p>	
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	<p>Declaration of Attorney Nancy J. LeVan filed on 10/3/16 states the Sylvia Nadine Webb Living Trust was created on 9/21/09. It was Amended and Restated on April 16, 2014. –<b>Declaration states the Trust was amended and restated on 4/16/14 after the conservatorship was established. Probate Court §2580(b)(11) requires prior Court approval to modify a revocable trust.</b></p>	
<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>		
<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>		
<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>		
			<p><b>Reviewed by:</b> skc / sef</p>
			<p><b>Reviewed on:</b> 9/27/16</p>
			<p><b>Updates:</b> 10/3/2016</p>
			<p><b>Recommendation:</b></p>
			<p><b>File 3- Webb</b></p>



**Probate Status Hearing RE: Visitation**

	<b>EVONIESHA SMITH</b> , mother, petitioned the court to terminate the guardianship. Minute order dated 12/3/16 denied the petition for termination. This status hearing was set re: visitation.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Continued from 9/1/16. Minute order states</b> Court investigator is to be present unless the Court deems not necessary.
	<b>ADRIANA BREWER</b> , non-relative, was appointed guardian on 9/11/14. – present in court on 4/23/15.	
<b>Cont. from 082015, 120315, 061616, 072816, 090116</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>		
		<b>Minute order dated 8/20/15 states</b> the Court orders visitation increased to every other weekend, beginning 8/25/15, from Friday at 2 p.m. thru Sunday at 2 p.m. Parties are to meet in Bakersfield a the bus depot to exchange the minor.
		<b>Reviewed by: KT</b>
		<b>Reviewed on: 9/30/16</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 5 – Smith</b>

Probate Status Hearing RE: Filing Proof of Increased Bond

	<b>ANTHONY McCURN, SR</b> , spouse, was appointed conservator of the person on 4/16/2015 and of the estate with \$9,600.00 bond on 2/22/2016.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. <b>Need bond or current written status report</b> 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.
	Amended Letters issued 2/22/2016.	
Cont. from	<b>Estimated value of estate:</b>	
Aff.Sub.Wit.	Annual income - \$ <b>8,736.00</b>	
Verified	(excludes 1/2 interest in real property estimated at \$75,000.00; Conservator owns other 1/2 interest)	
✓ Inventory	Corrected final I&A filed 8/9/2016 stated the bond of \$9,600.00 was sufficient. However, based on the value of the:	
PTC	personal property \$ 3,350.00	
Not.Cred.	annual income 8,736.00	
Notice of Hrg	recovery bond <u>1,208.60</u>	
Aff.Mail	<b>bond should be increased from \$9,600.00 to: \$13,295.00</b>	
Aff.Pub.	<b>Minute order dated 9/1/2016</b> set this status hearing for filing of the increased bond, stating bond needs to be increased to \$13,295.00.	
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: SEF
		Reviewed on: 9/30/2016
		Updates:
		Recommendation:
		File 6- McCurn

Attorney David J. Thelen, of Merced (for Guardian Dilila E. Aganza)

Probate Status Hearing Re: Filing of the First Accounting

		DILILA EULULIA AGANZA, mother, was appointed Guardian of the Estate on 8/17/2016, with funds of \$11,907.11 placed into a blocked account.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>OFF CALENDAR</b></p> <p><i>First Year Accounting</i> filed 10/4/2016 is set for hearing on 11/15/2016.</p> <p><u>Continued from 6/23/2016.</u> Minute Order states no appearances. David Thelen is to be personally present or by CourtCall on 10/6/2016 if accounting is not filed by 10/4/2016. The Court needs a status report filed by 10/4/2016 is the account is not filed.</p> <p><i>Clerk's Certificate of Mailing</i> shows a copy of the Minute Order dated 6/23/2016 was mailed to Attorney Thelen on 6/23/2016.</p> <p><b>The following issue from the previous hearing remains:</b></p> <ol style="list-style-type: none"> <li>1. Need first account of the guardianship estate, or a verified Status Report with proof of service to all interested parties pursuant to Local Rule 7.5.</li> </ol>
		Letters issued on 8/20/2015.	
Cont. from 062316		<b>Proof of Blocked Account was filed 10/20/2015</b> (attached to Corrected Final Inventory and Appraisal) showing funds of \$9,123.56 deposited for the minor in a blocked account.	
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg		<b>Corrected Final Inventory and Appraisal filed 10/20/2015</b> shows an estate value consisting of all cash in the sum of \$9,123.56.	
Aff.Mail			
Aff.Pub.			
Sp.Ntc.		<b>Minute Order dated 4/23/2015</b> from the hearing on the petition for appointment set the matter for status hearing on 6/23/2016 for filing of the first account of the Guardianship Estate.	
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt	X		
UCCJEA			
Citation			
FTB Notice			
			Reviewed by: LEG
			Reviewed on: 9/30/16
			Updates: 10/4/16
			Recommendation:
			File 7- Gonzalez

First Account and Report of Guardian of the Estate, Petition for Approval and for Allowance of Attorney Fees and Costs

		<p>TIFFANY-LIN DIRECTO, mother/guardian, is petitioner.</p> <p>Please see petition for details.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> If the petition is granted, a status hearing will be set as follows:</p> <ul style="list-style-type: none"> <li>• <b>Wednesday, April 12, 2017</b> at 9:00 a.m. in Department 303, for the filing of the final account.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: KT	
			Reviewed on: 9/30/16	
			Updates:	
			Recommendation:	
			File 8- Directo	

First Account and Report of Guardian of the Estate, Petition for Approval and for Allowance of Attorney Fees and Costs

		TIFFANY-LIN DIRECTO, mother/guardian, is petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> If the petition is granted, a status hearing will be set as follows:</p> <ul style="list-style-type: none"> <li><b>Wednesday, April 12, 2017</b> at 9:00 a.m. in Department 303, for the filing of the final account.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
		Account period: 6/30/15 – 7/31/16	
		Please see petition for details.	
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W/	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> KT
			<b>Reviewed on:</b> 9/30/16
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 8- Directo</b>

Probate Status Hearing RE: Filing of the First or Final Account

<b>DOD: 6/6/2015</b>		<p><b>GEORGIA CHRISTINE SALVO</b>, daughter, was appointed executor with full IAEA without bond on 8/13/2015.</p> <p><i>Letters issued 8/14/2015.</i></p> <p><b>Minute order dated 8/13/2015</b> set this for status of the filing of the first account or petition for final distribution.</p> <p>First and final account was approved 8/16/2016.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>OFF CALENDAR.</b> Accounting and order for final distribution was approved 8/16/2016.</p>
<b>Cont. from</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> SEF</p>			
<p><b>Reviewed on:</b> 9/30/2016</p>			
<p><b>Updates:</b></p>			
<p><b>Recommendation:</b></p>			
<p>File 10- Pierce</p>			

**Status RE: Filing of the First or Final Account**

<b>DOD: 4/18/15</b>	JOHN F. LUTZ, Brother, was appointed Executor with Full IAEA without bond and Letters issued on 8/13/15	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	At the hearing on 8/13/15, the Court set this status hearing for the filing of the first or final account.	1. <b>Need first account or petition for final distribution pursuant to Probate Code §12200 or written status report pursuant to Local Rule 7.5.</b>
<b>Cont. from</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input 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 type="checkbox"/> <b>Notice of Hrg</b>		
<input type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input 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: skc</b>
		<b>Reviewed on: 9/28/16</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 11- Lutz</b>

**Attorney: Heather H. Kruthers (for Public Administrator)**

**Petitioner: Marilyn De La Cruz Castillo (former Administrator)**

**Status Hearing Re Marilyn Castillo filing Accounting**

<b>DOD: 7/5/15</b>	<p><b>MARILYNN DE LA CRUZ CASTILLO</b>, daughter, was previously appointed Administrator with Full IAEA authority and bond set at \$500,000.00 on 10/15/15. Pursuant to minute order of 5/19/16 she was removed and the <b>PUBLIC ADMINISTRATOR</b> was appointed.</p> <p><b>PUBLIC ADMINISTRATOR's</b> letters issued on 7/15/16.</p> <p><b>Minute Order dated 7/28/16</b> states Marilyn Castillo is ordered to file accounting from when she was appointed on 7/15/15 to her removal on 5/19/16. Ms. Castillo is ordered to be personally present on 10/6/16. – Copy of the minute order was mailed to Marilyn De La Cruz Castillo on 7/28/16.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need Accounting 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</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> KT</p>	
	<p><b>Reviewed on:</b> 10/3/16</p>	
	<p><b>Updates:</b></p>	
	<p><b>Recommendation:</b></p>	
	<p><b>File 12- Castillo</b></p>	

**Status RE: Capacity Declaration**

<b>Age: 59</b>	<p><b>PUBLIC GUARDIAN</b> was appointed Conservator of the Person and Estate on 8/11/16. See Minute Order for details.</p> <p><b>History: RAQUEL PINEDA</b>, Daughter, was appointed Conservator of the Person on 5/9/16 and Letters issued 5/11/16.</p> <p>Petitioner had requested medical consent powers under Probate Code §2355 and dementia medication ad placement powers under Probate Code §2356.5.</p> <p><b>Minute Order 5/9/16 states:</b> Petitioner is to file a new capacity declaration; the Court grants the petition as to the person only.</p> <p><b>Examiner noted various defects with the Capacity Declaration filed 4/1/16.</b></p> <p><b>On 8/9/16, Lisa Horton, Court-appointed attorney for Conservatee, filed a Status Hearing Report.</b> The report recommends appointment of the PG as successor conservator due to issues within the family. See report for details.</p> <p><b>A Capacity Declaration of Dr. Guzman filed 10/3/2016 supports medical treatment consent powers.</b> However, the <i>Dementia Attachment</i> (page 4) is incomplete at items 9a(1)-(3) re: placement and 9b(1)-(3) re: administration of dementia medications.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order 8/11/16:</b> Raquel Pineda is no longer able to serve as conservator and requests to resign. The Court accepts the resignation; Letters are vacated forthwith. The Court appoints the Public Guardian as to the Person and Estate; Letters are to issue forthwith from the minute order. The Court notes that a capacity declaration is still needed.</p> <p><b>Note:</b> Letters issued to the PG on 8/19/16. Order re appointment entered 9/9/16 reflects general conservatorship of the person and estate without additional medical consent powers under Probate Code §2355 or dementia powers under §2356.5.</p> <p>1. <i>Capacity Declaration</i> of Dr. Guzman filed 10/3/2016 supports medical treatment consent powers. However, the <i>Dementia Attachment</i> (page 4) is incomplete at items 9a(1)-(3) re: placement and 9b(1)-(3) re: administration of dementia medications.</p> <p><b>Note:</b> Because the PG has been appointed as Conserator of the Estate, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> <li>• Thursday, Dec. 15, 2016 for filing I&amp;A</li> <li>• Thursday, Oct. 19, 2017 for filing the first account.</li> </ul>
<b>Cont. from 052616, 063016, 081116</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>		
	<b>Reviewed by:</b> skc	
	<b>Reviewed on:</b> 9/27/16	
	<b>Updates:</b> 10/4/2016 sef	
	<b>Recommendation:</b>	
	<b>File 13- Pineda</b>	

**Notice of Motion and Motion for Order Compelling Responses to Special Interrogatories, Demand for Inspection and Production of Documents and Things and Request for Admissions-Genuineness of Documents, and for Sanctions**

	<p><b>IRIS VOGT</b>, Petitioner, moves for an order compelling Respondent <b>LLOYD MARTIN</b> to serve responses to the Special Interrogatories, Set One, Request for Identification and Production of Document and Things, Set One, and Request for Admissions-Genuineness of Documents, Set One, served on him on 5/31/16, and for monetary sanctions to Petitioner of \$960.00 for attorney's fees and costs.</p> <p>This motion is made pursuant to CCP §§ 2030.290, 2013.310 and 2033.290 on the grounds that the information and documents requested are relevant to the subject matter of this action and are not privileged, that Respondent has failed to serve timely responses thereto, and that Respondent's failure to comply is without substantial justification.</p> <p>This motion is based on notice, the attached <b>Memorandum of Points and Authorities</b> filed 7/21/16, <b>Declaration of Steven F. Salazar</b> filed 7/12/16, and pleadings, records and files in this action and on such oral and documentary evidence to be presented at the hearing.</p> <p><b>Petitioner states</b> the referenced documents were served on Respondent through his attorney on 5/31/16, written responses due 6/30/16. On 7/1/16, Attorney Porter left a voice message with Attorney Salazar requesting extension of time to respond. Mr. Salazar was unavailable and out of state at the time.</p> <p>On 7/5/16, Mr. Salazar spoke with Mr. Porter and informed him that the responses were to have been served by 6/30/16 and time for objections to the responses had been waived. Counsel discussed terms of extension; however, agreement for a mutually satisfactory extension could not be reached.</p> <p>On 7/5/16, Mr. Salazar wrote to Mr. Porter confirming their discussion, including waiver, and demanded that Respondent serve his responses in order to avoid a motion to compel and sanctions. As of the date of this motion, no further response has been provided. See P&amp;A and Declaration for details.</p>	<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <p><b>Minute Order 9/1/16: Mr. Salazar requests continuance.</b></p> <p><b>Note: As of 9/27/16, nothing further has been filed.</b></p> <p><b>Note: Proof of Service filed 7/29/16 reflects service by mail of the motion, the memorandum of points and authorities, and the Declaration of Steven F. Salazar to Attorney Tres A. Porter on 7/29/16.</b></p> <p><b>Note: Beneficiary Iris Vogt's Petition filed 3/4/16 is set for Settlement Conference on 8/30/16. Court Trial originally set for 9/20/16 was continued to 2/21/17 pursuant to Stipulation and Order filed 8/25/16.</b></p> <p><b>Reviewed by: skc</b></p> <p><b>Reviewed on: 9/27/16</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b> File 14- Hannah</p>
<b>Cont. from 090116</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input 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 type="checkbox"/> <b>Notice of Hrg</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		

Notice of Motion and Motion for Order Compelling Responses to Special Interrogatories,  
Demand for Inspection and Production of Documents and Things and Request for  
Admissions-Genuineness of Documents, and for Sanctions

	<b>IRIS VOGT</b> , Petitioner, moves for an order compelling Respondent <b>LLOYD MARTIN</b> to serve responses to the Form Interrogatories, Set One, Request for Identification and Production of Document and Things, Set One, Request for Admissions, Set One, and Request for Admissions-Genuineness of Documents, Set One, served on him on 5/31/16, and for monetary sanctions to Petitioner of \$960.00 for attorney's fees and costs.	<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <p><u>Minute Order 9/1/16: Mr. Salazar requests continuance.</u></p> <p><u>Note: As of 9/27/16, nothing further has been filed.</u></p> <p><u>Note: Proof of Service filed 7/29/16 reflects service by mail of the motion, the memorandum of points and authorities, and the Declaration of Steven F. Salazar to Attorney Tres A. Porter on 7/29/16.</u></p> <p><u>Note: Beneficiary Iris Vogt's Petition filed 3/4/16 is set for Settlement Conference on 8/30/16. Court Trial originally set for 9/20/16 was continued to 2/21/17 pursuant to Stipulation and Order filed 8/25/16.</u></p> <p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 9/27/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 15- Hannah</b></p>
<b>Cont. from 090116</b>	This motion is made pursuant to CCP §§ 2030.290, 2013.310 and 2033.290 on the grounds that the information and documents requested are relevant to the subject matter of this action and are not privileged, that Respondent has failed to serve timely responses thereto, and that Respondent's failure to comply is without substantial justification.	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	This motion is based on notice, the attached <b>Memorandum of Points and Authorities</b> filed 7/21/16, <b>Declaration of Steven F. Salazar</b> filed 7/12/16, and pleadings, records and files in this action and on such oral and documentary evidence to be presented at the hearing.	
<input type="checkbox"/> <b>Verified</b>	<b>Petitioner states</b> the referenced documents were served on Respondent through his attorney on 5/31/16, written responses due 6/30/16. On 7/1/16, Attorney Porter left a voice message with Attorney Salazar requesting extension of time to respond. Mr. Salazar was unavailable and out of state at the time.	
<input type="checkbox"/> <b>Inventory</b>	On 7/5/16, Mr. Salazar spoke with Mr. Porter and informed him that the responses were to have been served by 6/30/16 and time for objections to the responses had been waived. Counsel discussed terms of extension; however, agreement for a mutually satisfactory extension could not be reached.	
<input type="checkbox"/> <b>PTC</b>	On 7/5/16, Mr. Salazar wrote to Mr. Porter confirming their discussion, including waiver, and demanded that Respondent serve his responses in order to avoid a motion to compel and sanctions. As of the date of this motion, no further response has been provided. See P&A and Declaration for details.	
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		

Petition for Appointment of Guardian of the Person

Age: 1	<b>TEMPORARY EXPIRES 10/06/2016</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Minute Order of 09/01/2016: Any responses need to be filed and served on everyone legally entitled by 09/22/2016.</b>  1. 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>• Jose Gonzalez (Maternal Grandfather)</li> <li>• Olivia Cervantes-Lopez (Maternal Grandmother)</li> </ul>
	<b>AUMAU TAITO</b> , paternal grandmother, is petitioner.  <u>Please see petition for details</u>		
Cont. from 072116, 090116			
<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 checked="" type="checkbox"/>	Pers.Serv.	w/	
<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: LV
			Reviewed on: 10/03/2016
			Updates:
			Recommendation:
			File 16- Taito

Petitioner: Monica Mansker (Pro per – Maternal aunt)

Petition for Appointment of Guardian of the Person

		<b><u>TEMPORARY EXPIRES 10/6/2016</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>MONICA MANSKER</b> , maternal aunt, is petitioner	
		<i>Please see petition for details.</i>	<p><b>Continued from 9/1/2016.</b> Minute order states this possibly could be the last extension of the <i>Letters</i>. Examiner notes given.</p> <p>The following issues still exist:</p> <ol style="list-style-type: none"> <li>1. Need proof of personal service at least 15 days before the hearing of the <i>Notice of Hearing</i> with a copy of the petition <u>or</u> consents and waivers or notice for:                             <ol style="list-style-type: none"> <li>a. Ronald Perry (potential father) – <i>unless the Court excuses notice</i></li> <li>b. Danny Mitchell (potential father)**</li> </ol> <p><b>**Note:</b> Proof of service filed 8/31/2016 shows Danny Mitchell (potential father) was served by mail; Prob C §1511 requires personal service.</p> </li> <li>2. Need proof of service at least 15 days before the hearing of the <i>Notice of Hearing</i> with a copy of the petition <u>or</u> consents and waivers of notice for:                             <ol style="list-style-type: none"> <li>a. Paternal grandparents re: Ronald Perry (unknown) – <i>unless the Court excuses notice</i></li> <li>b. Paternal grandparents re: Danny Mitchell (unknown) – <i>unless the Court excuses notice</i></li> <li>c. Maternal grandfather (not listed) – <i>unless the Court excuses notice</i></li> </ol> </li> </ol>
<b>Cont. from 090116</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>	x	
<input type="checkbox"/>	<b>Aff.Mail</b>	x	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>	x	
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" 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>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input checked="" type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> SEF
			<b>Reviewed on:</b> 10/3/2016
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 17- Burns</b>

**18 George A. Kerber and Esther L. Kerber Revocable Living Trust**  
**Case No. 16CEPR00748**

Attorney Paul J. Pimentel (for Petitioner George L. Kerber, Successor Trustee)

**Petition for Order Determining Title to Property**

George DOD: 3/21/2008	<p><b>GEORGE L. KERBER</b>, son and Successor Trustee, is Petitioner.</p> <p><b>Petitioner states:</b></p> <ul style="list-style-type: none"> <li>• Settlor <b>GEORGE A. KERBER</b> and <b>ESTHER L. KERBER</b> created the <b>GEORGE A. KERBER AND ESTHER L. KERBER REVOCABLE LIVING TRUST</b> under Trust Agreement dated <b>5/10/1994</b> (copy of Trust attached as Exhibit A;)</li> <li>• Petitioner is the sole acting Successor Trustee following the deaths of the Settlor (copies of death certificates and Affidavit of Change of Trustee attached as Exhibits B, C, and D);</li> <li>• Petitioner seeks an order confirming title to him as Successor Trustee of a pool of certain U.S. Treasury Savings Bonds owned by Settlor (Decedents) as their community property at the time the Trust was created, purchased between June 1986 through September 1993 (described on Exhibit E); the Bonds were acquired by Settlor while married and before creation of the Trust;</li> <li>• On 5/10/1994, the Decedents created the Trust that included specific language to place all then-owned or after-acquired securities and Bonds into the Trust;</li> </ul> <p style="text-align: center;">~Please see additional page~</p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
Esther DOD: 3/20/2014		
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail <span style="float: right;">w/</span>		
<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: LEG
		Reviewed on: 9/30/16
		Updates:
		Recommendation:
		File 18 - Kerber

**Petitioner states, continued:**

- *Schedule A* to the Trust identifies bonds as being an asset transferred into the Trust, providing that any and all bank accounts, brokerage accounts, certificates of deposit, stocks, bonds, securities and other investments of whatever kind or nature are assets of the Trust;
- At the time the Trust was created, Decedent's owned the Bonds as their community property; the Bonds were purchased between June 1986 through September 1993, ultimately resulting in a pool of bonds (*identified in Exhibit E*);
- Unfortunately, prior to and at the time of the Settlor's deaths, the Bonds were not transferred into the Trust;
- The Decedents acquired the Bonds while married and before the creation of the Trust;
- On 4/26/2005, both of the Decedents created Wills that have a "pour-over" clause (*copies attached as Exhibits F and G*);
- Because of the use of the Revocable Living Trust, it is expected that a probate of the Decedents' estates will not be necessary;
- A First Amendment to the Trust was done on 4/26/2005, for purpose of restating the Successor Trustee process and to amend a sequence of events to take place upon the death of the trustor; (*copy of the Amendment attached as Exhibit H*);
- The Amendment to the Trust did not involve transferring, selling or altering the character or ownership of the Bonds;
- The Decedents' failure to formally transfer title to the Bonds into the Trust cannot be taken to mean that the Bonds were not intended to be a Trust asset;
- Moreover, the probate of both the decedents' pour-over wills would accomplish the same objective sought through this petition, namely to transfer title from the decedent's name to that of Petitioner as Sole Successor Trustee of the Trust;
- Without an order from the court as requested in this petition, a formal probate proceeding will be required to transfer title from the decedents' name to the decedents' estate and then to the Trust; the purpose of this petition is to achieve the identical result, but without the expense and delay of a probate proceeding.

**Petitioner requests that the Court issue an order that the Bonds described on Exhibit E attached to the *Petition* are assets of the GEORGE A. KERBER and ESTHER L. KERBER REVOCABLE LIVING TRUST under Trust Agreement dated 5/10/1994.**



**Petitioner states, continued:**

- The Trustor created her Trust on 6/3/1986, and it included language that contemplated the possibility that the Trustee would acquire real property after the creation of the Trust;
- On 5/15/1997, Trustee bought the property on North Lucerne Lane in Fresno and took title to said property as an unmarried woman;
- On 4/16/2007, the Trustor amended her Trust, and the Amendment contained particular language reflecting the Trustor's intent that the property on North Lucerne Lane in Fresno, which is specifically identified and its disposition set forth, be distributed to Petitioner;
- Unfortunately, the Trustor did not transfer title to the property on North Lucerne Lane in Fresno into her Trust before her death;
- The Trustor's Will is a "pour-over" will that provides *[all estate residue is to be distributed to Petitioner as Trustee of the Trust]* (copy of Will attached hereto as Exhibit E);
- Because of the use of the revocable living Trust, it is expected that a probate of the Decedent's estate will not be necessary;
- Petitioner is informed and believes that because the Amendment specifically lists the Property as a Trust asset, it was the intent of the decedent to transfer title to the Property to the Trust;
- The Decedent's failure to formally transfer title to the Property into the Trust cannot be taken to mean that the Property was not intended to be a Trust asset. Moreover, the probate of the Decedent's pour-over will would accomplish the same objective sought through this Petition, namely to transfer title from the decedent's name to that of petitioner as successor Trustee of the Trust;
- Without an order from the Court as requested in this petition, a formal probate proceeding will be required to transfer title from the Decedent's name to the Decedent's estate and then to the Trust; the purpose of this Petition is to achieve the identical result but without the expense and delay of a probate proceeding.

**Petitioner requests that the Court issue an order that the real property at North Lucerne Lane in Fresno, is an asset of the LOUISE MAE ROBERTS INTER VIVOS TRUST AGREEMENT under Trust Agreement dated June 3, 1986.**

DOD: 09/02/2014	KEITH WILLIAM LUSK, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  Minute Order of 09/01/2016: Counsel will be filing a supplemental to cure examiner note defects. The Court denies request to waive any filing fees.
	40 days since DOD	
	No other proceedings	
Cont. from 090116	I&A - \$145,000.00	
<input type="checkbox"/> Aff.Sub.Wit.	Will dated: 05/05/2006 devises residue of the estate pass to the decedent's son, Keith William Lusk.	
<input checked="" type="checkbox"/> Verified	Petitioner requests Court determination that decedent's 100% interest in real property located at 4136 E. Fountain Way Fresno, pass to Keith William Lusk pursuant to decedent's will.	
<input checked="" 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		
		Reviewed by: LV
		Reviewed on: 10/03/2016
		Updates:
		Recommendation: Submitted
		File 20- Lusk

Petitioner: Felipe Campa (pro per)

Petitioner: Patricia Campa (pro per)

Petition for Appointment of Probate Conservator of the Person

		<p><b>THERE IS NO TEMPORARY. No temporary was requested.</b></p> <p><b>PATRICIA CAMPA and FELIPE CAMPA,</b> parents, are petitioners.</p> <p>Please see petition for details.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Court Investigator Advised Rights on 9/26/16.</b></p> <p>1. Need Conservatorship Video Viewing receipt for Petitioners, Patricia Campa and Felipe Campa.</p>
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> W/		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input checked="" type="checkbox"/>	<b>Pers.Serv.</b>		
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b> X		
<input checked="" 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 checked="" type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by: KT</b>
			<b>Reviewed on: 10/3/16</b>
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 21- Campa</b>

Attorney Catherine A. Amador (for Petitioners Kitty Mumford and Marshall Mumford)  
 Attorney Curtis D. Rindlisbacher (Court-appointed for proposed Conservatee)

**Petition for Appointment of Probate Conservator of the Estate**

		<b>NO TEMPORARY REQUESTED</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Item 5(f) of the <i>Petition</i> indicates the proposed Conservatee is developmentally disabled. Need proof of mailed service of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Probate Conservator</i> , showing service was mailed at least <b>30 days</b> before the hearing to Central Valley Regional Center (CVRC) as defined in § 1827.5, pursuant to Probate Code § 1822(e), or waiver of such notice by CVRC filed with the Court.— <i>Waiver of Notice of Hearing on Petition to Appoint Conservator by Central Valley Regional Center filed 10/5/2016.</i>  2. <i>Petition</i> does not indicate whether the special needs trust previously established for the proposed Conservatee was court-established, and if so, the case name and number.  <b>~Please see additional page~</b>
		<p><b>KITTY MUMFORD</b> and <b>MARSHALL MUMFORD</b>, sister and brother-in-law, are Petitioners and requests appointment as Co-Conservators of the Estate.</p> <p><b>~Please see Petition for details~</b></p> <p><b>~Please see additional page~</b></p>	
<b>Cont. from</b>			
<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		
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<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt	X	
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input checked="" type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			<b>~Please see additional page~</b>
			<b>Reviewed by:</b> LEG
			<b>Reviewed on:</b> 10/3/16
			<b>Updates:</b> 10/5/16
			<b>Recommendation:</b>
			<b>File 22- Williams</b>

Court Investigator's Report was filed on 10/3/2016.

**NEEDS/PROBLEMS/COMMENTS, continued:**

3. Need *Conservatorship Video Viewing Certificate* pursuant to Local Rule 7.15.8(A).

**Note: If *Petition* is granted, Court will set status hearings as follows:**

- Monday, November 7, 2016 at 9:00 a.m. in Dept. 303 for filing proof of \$9,900.00 bond;
- Monday, February 6, 2017 at 9:00 a.m. in Dept. 303 for filing of inventory and appraisal; and
- Monday, December 11, 2017 at 9:00 a.m. in Dept. 303 for filing of first account of the conservatorship estate.

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



**Spousal or Domestic Partner Property Petition**

<b>DOD: 1/21/16</b>		<p><b>JANE K. GREENE</b>, Surviving Spouse, is Petitioner.</p> <p>No other proceedings</p> <p>Decedent died intestate</p> <p>Petitioner requests determination that the following asset passed to the surviving spouse: All outstanding stock of Greene Restaurant Corporation owned by Gregory E. Greene represented by Certificate No. 1 in the amount of 16,500 shares.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Petitioner does not appear to allege that the stock is community property and does not provide any information re why the stock should pass to her. <b>Need clarification re date of marriage, status at death, circumstances and dates of acquisition of the asset, and any other information relevant to be sufficient to make such determination.</b></p>	
	<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>			
	<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> skc</p> <p><b>Reviewed on:</b> 9/28/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 24- Greene</b></p>				



**Petition for Final Distribution and for Order Fixing and Allowing Attorney's Fees**

<b>DOD: 8/25/15</b>		<p><b>MARIETTA GOMONET</b>, Spouse and Executor with Full IAEA without bond, is Petitioner.</p> <p>Accounting is waived</p> <p>I&amp;A: \$400,000.00 POH: \$400,000.00 (real property located in Gilroy, Santa Clara County)</p> <p>Executor waives compensation</p> <p>Attorney: \$6,000.00 (less than statutory)</p> <p>Costs: \$1,898.50 (filing, publication, certification, recording, appraisal)</p> <p>Distribution pursuant to the decedent's will is to:</p> <p>Marietta Gomonet, as Trustee of the Gomonet Family Trust: 100% of the interest in the Gilroy real property and any subsequently discovered property</p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
<b>Cont. from 092116</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input checked="" type="checkbox"/>	<b>Inventory</b>			
<input checked="" type="checkbox"/>	<b>PTC</b>			
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			
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<input type="checkbox"/>	<b>Aff.Pub.</b>			
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<input type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input checked="" type="checkbox"/>	<b>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 checked="" type="checkbox"/>	<b>FTB Notice</b>			
<b>Reviewed by: skc</b>				
<b>Reviewed on: 9/28/16</b>				
<b>Updates: 10/4/2016 (sef)</b>				
<b>Recommendation: SUBMITTED</b>				
<b>File 26- Gomonet</b>				

Petition for Appointment of Temporary Guardian of the Person

		<b><u>GENERAL HEARING 11/30/2016</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		REARTIST WILLIAMS, maternal aunt, is petitioner	<ol style="list-style-type: none"> <li>1. Need <i>Notice of Hearing</i>.</li> <li>2. Need proof of personal service with at least 5 court days notice of <i>Notice of Hearing</i> with copy of temporary petition <u>or</u> consent and waiver of notice for:                         <ol style="list-style-type: none"> <li>a. Rachel Williams (mother) – <i>unless the Court excuses notice</i></li> </ol> </li> </ol>
		Please see petition for details.	
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	x	
	Aff.Mail		
	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: SEF
			Reviewed on: 10/3/2016
			Updates:
			Recommendation:
			File 27- Smith

Status RE: Filing of the Inventory and Appraisal

	<p><b>RAQUEL PINEDA</b>, Daughter, was appointed Conservator of the Person and Estate on 5/5/16 and Letters issued 5/11/16. (Bond reserved)</p> <p>At a status hearing re capacity declaration and reserved bond on 5/26/16, the Court set this status hearing for the filing of the Inventory and Appraisal.</p> <p><b>Declaration of Raquel Pineda filed on 9/27/16 states</b> she is requesting that her father be assigned to a state conservator. Due to uncontrollable circumstances she is no longer able to provide care.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 9/29/16. Minute order states</b> Ms. Pineda no longer wishes to be conservator, and requests that the Public Guardian be appointed.</p> <p><b>Note:</b> Ms. Pineda was also appointed conservator of her mother, also named Raquel Pineda, in related matter 16CEPR00014; however, at a status hearing on 8/11/16, Ms. Pineda resigned as conservator and the Court appointed the Public Guardian in that matter. Please see page 13 of this calendar.</p> <p><b>1. Need Inventory and Appraisal pursuant to Probate Code §2610 or written status report pursuant to Local Rule 7.5.</b></p>
<b>Cont. from 092916</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>		
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<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> skc/KT
		<b>Reviewed on:</b> 9/30/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 28- Pineda</b>