

(1) Petition for Settlement of First and Final Accounting (2) and Final Distribution

<p><b>DOD: 01/29/08</b></p> <hr/> <hr/> <hr/> <p>Cont. from 110111,          112811, 020612, 040212,          052112, 070912, 083112</p> <table border="1" style="width:100%; border-collapse: collapse;"> <tr><td style="width:15%;"><b>Aff.Sub.Wit.</b></td><td></td></tr> <tr><td><input checked="" type="checkbox"/> <b>Verified</b></td><td></td></tr> <tr><td><input checked="" type="checkbox"/> <b>Inventory</b></td><td></td></tr> <tr><td><input checked="" type="checkbox"/> <b>PTC</b></td><td></td></tr> <tr><td><input checked="" type="checkbox"/> <b>Not.Cred.</b></td><td></td></tr> <tr><td><input checked="" type="checkbox"/> <b>Notice of Hrg</b></td><td></td></tr> <tr><td><input checked="" type="checkbox"/> <b>Aff.Mail</b></td><td>w/</td></tr> <tr><td><b>Aff.Pub.</b></td><td></td></tr> <tr><td><b>Sp.Ntc.</b></td><td></td></tr> <tr><td><b>Pers.Serv.</b></td><td></td></tr> <tr><td><b>Conf. 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Posting</b>		<b>Status Rpt</b>		<b>UCCJEA</b>		<b>Citation</b>		<b>FTB Notice</b>	x	<p><b>SHERRI VAUGHT</b>, Administrator, is Petitioner.</p> <p><b>Supplemental Petition for Settlement of First and Final Accounting and Final Distribution filed 04/02/12</b> states:</p> <ol style="list-style-type: none"> <li>The requirements of Revenue &amp; Taxation Code § 480 have been satisfied by filing of a change of ownership statement with the County recorder or assessor.</li> <li>Notice is not required under PrC § 9202 (a) because the decedent did not receive Medi-Cal benefits, and 9202 (b) because no beneficiary is incarcerated.</li> <li>Petitioner sold the real property of the estate on 01/31/11 for a sale price of \$91,750.00. Notice of Proposed Action was given to decedent's heirs and consent was obtained from Victoria Rapp on 01/26/11. No objections to the sale were received. The sale resulted in net proceeds to the estate of \$8,777.17.</li> <li>Petitioner presents an amended Summary of Account as follows:</li> </ol> <p>Account period: <b>04/06/09 – 03/01/12</b></p> <table style="width:100%;"> <tr><td>Accounting</td><td>-</td><td>\$166,000.00</td></tr> <tr><td>Beginning POH</td><td>-</td><td>\$166,000.00</td></tr> <tr><td>Ending POH</td><td>-</td><td>\$11,777.17</td></tr> <tr><td>Administrator</td><td>-</td><td>waives</td></tr> <tr><td>Attorney</td><td>-</td><td>waives</td></tr> </table> <p><b>Distribution, pursuant to intestate succession, is to:</b></p> <table style="width:100%;"> <tr><td>Sherri Vaught</td><td>-</td><td>\$5,888.58</td></tr> <tr><td>Victoria Rapp</td><td>-</td><td>\$5,888.58</td></tr> </table>	Accounting	-	\$166,000.00	Beginning POH	-	\$166,000.00	Ending POH	-	\$11,777.17	Administrator	-	waives	Attorney	-	waives	Sherri Vaught	-	\$5,888.58	Victoria Rapp	-	\$5,888.58	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>CONTINUED FROM 08/31/12</b>  <b>Minute Order from 08/31/12 states: Mr. Bruce informs the Court that Ms. Vaught has moved out of the state. The Court will excuse her appearance. Matter may be taken off calendar if IRS notice has been filed with the Court.</b></p> <p><b>As of 10/08/12, the following notes remain:</b></p> <ol style="list-style-type: none"> <li>The accounting is incomplete pursuant to Probate Code § 1061. The Accounting does not list receipts, distributions or other information required pursuant to Probate Code § 1061. <b>Need revised accounting to include the relevant schedules (receipts/disbursements, etc.) or waiver of accounting from Victoria Rapp.</b></li> <li>Neither the Petition nor the Supplemental Petition state whether notice was given to The Franchise Tax Board as required per Probate Code § 9202 (c).</li> </ol> <hr/> <p><b>Reviewed by:</b> JF</p> <hr/> <p><b>Reviewed on:</b> 10/08/12</p> <hr/> <p><b>Updates:</b></p> <hr/> <p><b>Recommendation:</b>  <b>File 1 - Vaught</b></p>
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Jerry age: 63 years	PATRICIA SCHOOLCRAFT, sister, was appointed successor conservator on 8/23/11.	NEEDS/PROBLEMS/COMMENTS:
James age: 58 yrs		
Cont. from	Court Investigator Charlotte Bien's Report filed on 8/22/12.	
Aff.Sub.Wit.		
Verified	This status hearing was set for Failure to File Petition to Fix Residence Outside the State of California.	
Inventory		
PTC	Notice of the Status Hearing was sent to Patricia Schoolcraft and to James Vallis on 8/22/12.	
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		Reviewed by: KT
UCCJEA		
Citation		Reviewed on: 10/8/12
FTB Notice		
		Updates:
		Recommendation:
		File 2 - Ray

Atty Kruthers, Heather H (for Administrator/Public Administrator)

Atty Colucci, Donald J. (for American Contractor Indemnity Company)

Probate Status Hearing Re: Failure to File a First Account or Petition for Final Distribution [Prob. C. 12200, et seq.]

<b>DOD: 4/10/08</b>	<b>PUBLIC ADMINISTRATOR</b> , Administrator, is petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need current status report, first account or petition for final distribution.</p> <hr/> <p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 10/8/12</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 3 - Jacobs</b></p>
<b>Cont. from</b>	<b>REBECCA JACOBS</b> , daughter/former administrator, was appointed with full IAEA authority and bond of \$107,000.00.	
<b>Aff.Sub.Wit.</b>	Guy Johnson, attorney for the former Administrator, Rebecca Jacobs, filed a <i>Petition to Terminate Estate Proceedings; for Removal of Personal Representative; for Attorney to be Relieved as Counsel and for Exoneration of the Bond</i> , which was set for hearing on 3/11/11. On that date the court removed Ms. Jacobs for lack of moving forward and non-contact with her attorney and the Public Administrator was appointed.	
<b>Verified</b>	The Public Administrator was ordered to investigate any possible mismanagement of monies and any needed litigation to collect monies owed to the estate. He was ordered to go after the bond if appropriate.	
<b>Inventory</b>	After conducting an investigation, it was determined that Rebecca Jacobs breached her fiduciary duty by failing to sell the real property asset, which harmed the estate.	
<b>PTC</b>	The Public Administrator determined the total amount of harm to the estate was \$14,317.93, however since Rebecca Jacobs was a 50% beneficiary the Public Administrator requested a surcharge of \$7,158.97 against Ms. Jacobs.	
<b>Not.Cred.</b>	This status hearing was set for the filing of the First Account or Petition for Final Distribution. Copy of the Notice of Status Hearing was mailed to County Counsel on 8/22/12.	
<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>		

**Probate Status Hearing Re: Termination of Proceeding for Deceased Conservatee  
 [Prob. C. 1860, et seq.]**

<b>DOD: 4/20/11</b>	<p><b>DONNA BRIGGS</b> was appointed conservator of the person and estate without bond on 8/21/09.</p> <p>Inventory and appraisal shows an estate valued at \$272,675.54</p> <p>Conservatee died on 4/20/11.</p> <p>This status hearing was set for termination of proceedings for deceased conservatee.</p> <p>Notice of Status Hearing was mailed to Donna Briggs and to Joanne Sanoian on 8/28/12.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need first and final account or current status report.</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>				
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<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: KT</b>	
			<b>Reviewed on: 10/8/12</b>	
			<b>Updates:</b>	
		<b>Recommendation:</b>		
		<b>File 4 - Foley</b>		

Probate Status Hearing Re: Failure to File First Account

Age:		NEEDS/PROBLEMS/COMMENTS:  <b>OFF CALENDAR.</b> 1 <sup>st</sup> account filed and set for hearing on 11/14/12.
DOD:		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 10/8/12
		Updates:
		Recommendation:
		File 5 - Clark



Status Hearing Re: Filing of the Inventory and Appraisal

Age: 15 years DOB: 2/15/1996		NEEDS/PROBLEMS/COMMENTS:  <p style="text-align: center;"><b><u>OFF CALENDAR</u></b></p> <p>I&amp;A filed, 1<sup>st</sup> account settled. Next account due by 8-14-14 per minute order 9-18-12</p>
Cont. from 041012, 061212, 062912		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt	X	
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 10-9-12
		Updates:
		Recommendation:
		File 7 - Fulcher

<b>DOD: 3/9/12</b>	<p><b>MICHAEL A. HARRIS</b> and <b>HILARY A. RODRIGUEZ</b> were appointed Co-Executors with full IAEA and without bond on 5/3/12.</p> <p><b>Minute order dated 5/3/12</b> set this status hearing for the filing of the inventory and appraisal.</p> <p><b>Status Report filed on 10/3/12</b> states the first notice counsel received of any status hearing was received in the mail following the hearing. No notice of a status hearing was provided prior to the 9/4/12 status hearing.</p> <p>Counsel for the Executors cannot personally attend the 10/12/12 status hearing as he will be out of the state on that date for a family event scheduled months ago that cannot be rescheduled. Counsel will have one of his partners appear at the status hearing.</p> <p>An inventory and appraisal is due to be filed. The inventory has been sent to the probate referee. The inventory includes real property out of Fresno County. It is expected to take additional time to obtain all the appraisals. <b>Counsel requests an additional 30 to 45 days to completion of the appraisal and filing of the inventory.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need inventory and appraisal</p>
<b>Cont. from 090412</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>		
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<b>Objections</b>		
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<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 8/29/12</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 8 - Harris</b></p>

Status Hearing Re: Filing of the Inventory and Appraisal

<b>DOD: 10/23/2011</b>		<p><b>ANNA F. WILLIAMS</b>, daughter, was appointed Executor without bond on 4/16/12.</p> <p><b>Minute order dated 4/16/12</b> set this status hearing for the filing of the inventory and appraisal. Anna F. Williams was present in court when this status hearing was set.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 8/16/12. Minute order states Anna Williams is to be personally present on 10/12/12.</b></p> <p>1. Need Inventory and appraisal.</p>	
<b>Cont. from 081612</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>				
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<b>Order</b>				
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<b>Status Rpt</b>				
<b>UCCJEA</b>				
<b>Citation</b>				
<b>FTB Notice</b>				
				<b>Reviewed by: KT</b>
				<b>Reviewed on: 10/8/12</b>
				<b>Updates:</b>
		<b>Recommendation:</b>		
		<b>File 9 - Turner</b>		