

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

DOD: 01/29/08		SHERRI VAUGHT, Administrator, is Petitioner.		NEEDS/PROBLEMS/COMMENTS:	
		Supplemental Petition for Settlement of First and Final Accounting and Final Distribution filed 04/02/12 states:		CONTINUED FROM 08/31/12	
Cont. from 110111, 112811, 020612, 040212, 052112, 070912, 083112		1. The requirements of Revenue & Taxation Code § 480 have been satisfied by filing of a change of ownership statement with the County recorder or assessor.		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.	
	Aff.Sub.Wit.	2. 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.		As of 10/08/12, the following notes remain:	
✓	Verified	3. 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.		1. 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. Need revised accounting to include the relevant schedules (receipts/disbursements, etc.) or waiver of accounting from Victoria Rapp.	
✓	Inventory	4. Petitioner presents an amended Summary of Account as follows:		2. Neither the Petition nor the Supplemental Petition state whether notice was given to The Franchise Tax Board as required per Probate Code § 9202 (c).	
✓	PTC	Account period: 04/06/09 – 03/01/12			
✓	Not.Cred.	Accounting - \$166,000.00			
✓	Notice of Hrg	Beginning POH - \$166,000.00			
✓	Aff.Mail	Ending POH - \$11,777.17			
	Aff.Pub.	Administrator - waives		Reviewed by: JF	
	Sp.Ntc.	Attorney - waives		Reviewed on: 10/08/12	
	Pers.Serv.	Distribution, pursuant to intestate succession, is to:		Updates:	
	Conf. Screen	Sherri Vaught - \$5,888.58		Recommendation:	
	Letters	Victoria Rapp - \$5,888.58		File 1 - Vaught	
	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
✓	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
	UCCJEA				
	Citation				
	FTB Notice	x			

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		Reviewed by: KT
Aff. Posting		
Status Rpt		Reviewed on: 10/8/12
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 2 - Ray

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

DOD: 4/10/08	PUBLIC ADMINISTRATOR , Administrator, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>OFF CALENDAR. Petition for Final Distribution was filed and is set for hearing on 11/15/12.</p> <p>1. Need current status report, first account or petition for final distribution.</p>
Cont. from	REBECCA JACOBS , daughter/former administrator, was appointed with full IAEA authority and bond of \$107,000.00.	
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		
	<p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p>	
		<p>Reviewed by: KT</p> <p>Reviewed on: 10/8/12</p> <p>Updates: 10/11/12</p> <p>Recommendation:</p> <p>File 3 - Jacobs</p>

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

DOD: 4/20/11	<p>DONNA BRIGGS 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>Status Report filed on 10/11/12 states a draft of the First and Final Account and Report of Conservator is nearly completed and should be filed within 30 days. Attorney Lisa Horton requests the status hearing be continued for 30 days to complete and file the First and Final Account.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need first and final account</p>		
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: 10/11/12	
		Recommendation:		
		File 4 - Foley		

Probate Status Hearing Re: Failure to File First Account

Age:		NEEDS/PROBLEMS/COMMENTS: OFF CALENDAR. 1 st 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: Payment of Fees

Age: 84 years	<p>PUBLIC GUARDIAN, as Conservator, filed a petition for payment of fees and commissions. The Petition stated the conservatee's wife was to apply for medi-cal on his behalf, and to handle all community assets. It was the Petitioner's understanding that anything not covered by medi-cal would be paid from community assets of the wife.</p> <p>Conservatee's spouse, Beverly Hodgkiss, appears at the hearing and objected. The matter was continued. At the continued hearing the court indicated to the parties that it believes the fees are appropriate and should be paid by the person who controls the community property. The Court granted the petition and set this status hearing re: payment of fees.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need current status report.</p>	
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: 10/9/12			
Updates:			
Recommendation:			
File 6 - Hodgkiss			

Status Hearing Re: Filing of the Inventory and Appraisal

Age: 15 years DOB: 2/15/1996		NEEDS/PROBLEMS/COMMENTS: <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>I&A filed, 1st 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

DOD: 3/9/12	<p>MICHAEL A. HARRIS and HILARY A. RODRIGUEZ were appointed Co-Executors with full IAEA and without bond on 5/3/12.</p>	NEEDS/PROBLEMS/COMMENTS:
Cont. from 090412	<p>Minute order dated 5/3/12 set this status hearing for the filing of the inventory and appraisal.</p>	1. Need inventory and appraisal
Aff.Sub.Wit.	<p>Status Report filed on 10/3/12 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>	Reviewed by: KT
Verified	<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>	Reviewed on: 8/29/12
Inventory	<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. Counsel requests an additional 30 to 45 days to completion of the appraisal and filing of the inventory.</p>	Updates:
PTC		Recommendation:
Not.Cred.		File 8 - Harris
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		

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 10/23/2011		<p>ANNA F. WILLIAMS, daughter, was appointed Executor without bond on 4/16/12.</p> <p>Minute order dated 4/16/12 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>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 8/16/12. Minute order states Anna Williams is to be personally present on 10/12/12.</p> <p>1. Need Inventory and appraisal.</p>	
Cont. from 081612				
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 9 - Turner		