

1 Edith J. Souza (Estate) Case No. 03CEPR01057

Attorney Kruthers, Heather H (for the Public Administrator – Petitioner)

First and Final Account and Report of Successor Administrator and Petition for Allowance of Ordinary Commissions and Fees and for Distribution

DOD: 03/11/2003	PUBLIC ADMINISTRATOR , Successor Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:	
	Account Period: 02/07/2014 – 07/09/2015		
Cont. from	Accounting - \$97,463.29		
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$95,100.00		
<input checked="" type="checkbox"/> Verified	Ending POH - \$97,463.29 (\$2,363.29 is cash)		
<input checked="" type="checkbox"/> Inventory			
<input type="checkbox"/> PTC	Administrator - \$1,000.00 (less statutory)		
<input checked="" type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg	Attorney - \$750.00 (less statutory)		
<input checked="" type="checkbox"/> Aff.Mail	Bond - \$178.83		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.	Distribution, pursuant to Assignments of Interest filed 05/06/2015 and 07/01/2015, is to:		
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen	Donald Souza – ½ interest in real property		
<input checked="" type="checkbox"/> Letters 02/09/04	Bill Williams – ½ interest in real property		
<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: LV
			Reviewed on: 10/09/2015
		Updates:	
		Recommendation: Submitted	
		File 1 – Souza	

DOD: 10-8-97	CYNTHIA BLACKSTOCK, daughter, is Executor.	NEEDS/PROBLEMS/COMMENTS: Minute Order 3/4/15: Counsel requests a continuance to complete the accounting. Matter continued to 10/14/15. If the required documents are filed two court days before the next hearing, no appearance will be necessary. If the required documents are not filed, counsel is to submit a status report. 1. Need Second Account and/or Final Account or verified written status report pursuant to local rule.
	Executor's First Account was settled on 2-10-14.	
	At hearing on 2-10-14, the Court set this status hearing for the filing of the Second Account and/or Final Account.	
Cont. from 082914, 022515, 030415	Status Report filed 2-24-15 states the following actions have transpired since the first account was settled:	
Aff.Sub.Wit.	<ul style="list-style-type: none"> • Executor obtained a loan from a private party secured by a first deed of trust against the residence in the approximate amount of \$40,000.00 to cover the unpaid property taxes which were in default. As a result, a tax sale was avoided and the residence was retained. 	
Verified	<ul style="list-style-type: none"> • Executor continues to seek a loan on the property to pay the expenses of administration. It is anticipated that the residence will be distributed to Ms. Blackstock, who is the devisee of the residence, subject to such loan. She may qualify for a reverse mortgage to discharge debts and expenses of administration. 	
Inventory	<ul style="list-style-type: none"> • The creditor's claims remaining do not exceed \$500 total and counsel is contacting claimants to determine whether the claims remain outstanding or have been satisfied. 	
PTC	<ul style="list-style-type: none"> • The decedent's former spouse, Mickey Manuel, filed a claim alleging payment of property taxes, and a civil action was filed on the rejected claim. Executor filed an answer, but no further proceedings have occurred. 	
Not.Cred.	<ul style="list-style-type: none"> • Within 6-9 months, Executor anticipates being able to obtain a loan or make other arrangements for payment of fees and costs and satisfaction of outstanding claims and distribute the residence on waiver of accounting. 	
Notice of Hrg	It is respectfully requested that administration of the estate continue and that the court set further status as appropriate.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc Reviewed on: 10/12/15 Updates: Recommendation: File 2 - Manuel

DOD: 04/13/2010	JOACHIM VOSS , was appointed Executor with full IAEA authority and bond of \$300,000.00.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	Minute Order of 01/21/2015 set this status hearing regarding Status as to Real Property. Minute Order states Mr. Helon and Mr. Rindlisbacher each state that they received notice. Ms. Marois advises that the lake property is currently listed at the reduced price of \$192,500.00. Ms. Marois is to file written status report at least 10 days prior to the next hearing that includes the appraisal amount, the price it is listed at, and the month and year of each reduction for each property.	
Aff.Sub.Wit.	Status Report Regarding Oregon Real Properties filed 09/25/2015 states at the time of the Decedent's death he owned interest in real properties located in Wallowa County, Oregon as follows: (a) an unimproved lot on Wallowa Lake, and (b) a one-half tenant-in-common interest in three contiguous unimproved lots in the City of Enterprise, County of Wallowa, State of Oregon. The Oregon Properties are the subject of a probate proceeding in the Circuit Court of the State of Oregon for the County of Wallowa – Probate Department (No. 2946). Joachim Voss, the Executor herein, is the Personal Representative for the Oregon Probate.	Reviewed by: LV
Verified	Wallowa County is located in the far northeast corner of Oregon, and it's bordered by the states of Washington and Idaho. The county is home to Hells Canyon National Recreation Area, Wallowa Lake, and the Eagle Cap Wilderness Area. The current realtor for the Oregon Properties, Russ Ruonavaara of Wallowa County Brokers, recently advised the undersigned that the population of the County is 7,000, that there are currently just under 300 properties listed for sale in the County, 37 buildable home lots, of which 9 are in Enterprise. To describe the rural nature of the County, he notes that there are no stop lights in the county. He further explained that the County once housed three lumber mills, all of which are now closed. The mill employed about 600 "younger" people, whom have no left the county, leaving mostly retired persons as permanent residents plus tourists during the 120-day tourist season from June through October. A brief description of Wallowa Lake, which appeared in the July+August 2014 edition of via, the AAA Magazine.	Reviewed on: 10/12/2015
Inventory	Please see additional page	Updates:
PTC		Recommendation:
Not.Cred.		File 3 – Fujisaka
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		

Wallowa Lake Property. The Wallowa Lake Property is an unimproved .36 acre lakefront lot. Importantly, there is a "water certificate" associated with the property, which entitles its owner to obtain water, thereby allowing improvements to be made on the property, and presumably contributing to its value and stability. Appraised values of this property and the history of the listing prices of the Wallowa Lake Property are listed as Exhibit B.

Enterprise Lots. Together, the three contiguous Enterprise Lots comprise 1.44 unimproved acres. The Decedent's fifty percent tenant-in-common interests were not discovered until after the California and Oregon probates were opened and the Oregon Inheritance Tax 2010 Form IT-1 had been filed. Upon discovering the Decedent's ownership interests in the Lots, the Executor and his Oregon counsel, Sam Tucker, made extensive efforts to induce the co-owners, Mr. and Mrs. James Litsinger (as trustees of a trust, presumably a revocable trust and who reside in California), to cooperate with a sale and/or to buy the Estate's interests in the Lots. Initially, the co-owners were uncooperative in listing the lots for sale and they have shown no interest in purchasing the Estate's interest in Lots. After numerous requests for cooperation, the Litsingers consented to listing the Lots for sale and selected Russell Ruonavaara, Wallowa County Brokers, to represent them. Extensive utility, sidewalk improvements and road installation are required to develop the Lots and the terrain is rocky, making development of the Lots expensive. Appraised values of the Lots and the history of the listing prices of the Lots are listed as Exhibit C.

According to the current listing broker for all of the Oregon Properties, "the problem is not the price, but lack of buyers."

4 Angel Ybarbo (GUARD/P)

Case No. 11CEPR00561

Petitioner Candelario Ybarro, Jr. (Pro Per Petitioner)

Petition for Visitation

		<p>CANDELARIO YBARBO, JR., father, is Petitioner.</p> <p align="center">~Please see Petition for details~</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 9/9/2015. Minute Order states ICWA forms are provided in open court and are to be completed by Mr. Ybarro and returned to the Clerk's office immediately.</p> <p>The following issues from the last hearing remain:</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i> and proof of 15 days' service prior to hearing of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Visitation or Consent and Waiver of Notice</i>, for: <ul style="list-style-type: none"> • Debra Macias, Guardian. 2. Petitioner previously reported that he is of Native American Ancestry – of the Apache Tribe and of another tribe in Alaska, but he could not remember the tribe name. Notice pursuant to the Indian Child Welfare Act (ICWA) was not provided at the time the instant guardianship was granted on 8/29/2011. <i>Notice of Child Custody Proceeding for Indian Child</i> (Form ICWA-030) is required for this matter to proceed, which the Court will serve on necessary agencies, including the Bureau of Indian Affairs. File contains a blank copy of this form for completion and return to the Probate Court Clerk immediately for service to required agencies.
Cont. from 090915			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	ICWA <input type="checkbox"/>		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg <input type="checkbox"/>		
<input type="checkbox"/>	Aff.Mail <input 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 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>Reviewed by: LEG</p> <p>Reviewed on: 10/12/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 4 – Ybarbo</p>	

Second Account Current and Report of Conservator and Petition for Allowance of Compensation to Conservator and Attorney

Age: 83	PUBLIC GUARDIAN , Conservator, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. The real property asset of the estate was sold during the account period. Therefore, need original closing escrow statement showing the charges and credits pursuant to Probate Code § 9202(c)(4).</p> <p>Note: A Status Hearing will be set as follows:</p> <ul style="list-style-type: none"> Wednesday, June 28, 2017 at 9:00am in Dept. 303 for filing of the Third Account <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>
	Account period: 05/01/13 – 04/30/15	
	Accounting - \$169,780.91	
	Beginning POH - \$118,189.74	
	Ending POH - \$30,199.65 (\$27,529.87 is cash)	
Cont. from	Conservator - \$4,722.88 (20.8 staff hours @ \$76/hr. and 32.73 Deputy hours @ \$96/hr.)	
<input type="checkbox"/> Aff.Sub.Wit.	Attorney - \$2,500.00 (ok per Local Rule)	
<input checked="" type="checkbox"/> Verified	Bond fee - \$276.76 (ok)	
<input type="checkbox"/> Inventory	Petitioner prays for an Order:	
<input type="checkbox"/> PTC	1. Approving, allowing and settling the second account;	
<input type="checkbox"/> Not.Cred.	2. Authorizing the conservators and attorney fees and commissions; and	
<input checked="" type="checkbox"/> Notice of Hrg	3. Authorizing payment of the bond fee.	
<input checked="" type="checkbox"/> Aff.Mail w/	Court Investigator Samantha Henson filed a report on 08/04/15.	
<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 checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 2620(c) x		
<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: JF
		Reviewed on: 10/09/15
		Updates:
		Recommendation:
		File 5 – Steinhauer

DOD: 10/3/1994	ROBERT L. JOHNSON was appointed Administrator without bond and with Limited IAEA authority on 7/31/12.	NEEDS/PROBLEMS/COMMENTS:
	Letters issued 7/31/12.	
Cont. from 100413,		
121313, 032814,	I & A filed on 9/11/12 shows an estate	
072514, 111214,	valued at \$40,000.00	
042215, 060315,		
080515	Minute order dated 7/31/12 set status	
Aff.Sub.Wit.	hearing on 10/4/13 for the filing of the	
Verified	First Account or Petition for Final	
Inventory	Distribution. Minute order indicates Mr.	
PTC	Rindlisbacher was present.	
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		

NEEDS/PROBLEMS/COMMENTS:

Continued from 8/5/15. Minute order states Mr. Rindlisbacher represents that Mr. Johnson is trying to raise the money to pay the county of Fresno because he wants to keep the property, but the other heirs are uncooperative. Jr. Johnson requests 60 days. The court makes no indication that it would approve a note to an heir when the property can be sold.

- Need first account, petition for final distribution 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.

Examiner notes Sam Johnson Jr. survived the decedent (petition for probate indicates he died in 2004 or 2005) and declaration filed on 7/23/14 states Sam passed away after the decedent. Therefore, the estate of Sam Johnson Jr. is the other beneficiary of this estate and not his two children.

Reviewed by: KT

Reviewed on: 10/9/15

Updates:

Recommendation:

File 6 - Johnson

Attorney Gin, Robert W. (for Terri Denise Gill, Executor)
 Attorney Pape, Jeffrey B. (for Robert Hanggi, estranged spouse)

First and Final Account and Report of Administration, Petition for Settlement, for Allowance of Statutory Compensation to Executor and to Attorneys, and for Final Distribution

DOD: 4/14/2012	TERRY DENISE GILL , daughter and Executor, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 7/29/2015. Minute Order states counsel requests 60 days.</p> <ol style="list-style-type: none"> Summary of Account lists charges as \$158,079.10, while credits are listed as \$159,686.59, resulting in an unexplained difference of \$1,607.49, causing the accounting not to balance. Charges must equal credits as provided by Probate Code § 1061(c). Need clarification and/or amended account pursuant to Probate Code § 1060 et seq. Need itemization of costs requested for reimbursement as required by Local Rule 7.17(C) for the Court in its discretion to consider and approve reimbursement to attorney of allowable costs advanced. <p>~Please see additional page~</p>
Cont. from 072915	Account period: 2/19/2013 – 4/29/2015	
<input type="checkbox"/> Aff.Sub.Wit.	Accounting - [\$158,079.19?]	
<input checked="" type="checkbox"/> Verified	Beginning POH - \$137,079.10	
<input checked="" type="checkbox"/> Inventory	Ending POH - \$113,058.83 (\$4,057.43 cash)	
<input type="checkbox"/> PTC		
<input checked="" type="checkbox"/> Not.Cred.	Executor (statutory) - [\$5,112.37?]	
<input checked="" type="checkbox"/> Notice of Hrg	Attorney (statutory) - [\$5,112.37?]	
<input checked="" type="checkbox"/> Aff.Mail	Attorney XO - \$12,290.30 (per Declaration in Support of Request filed 7/29/2015 and itemization in Exhibit C; for obtaining family law attorney records related to Decedent's dissolution; for petition for a probate homestead over Decedent's residence owned by Decedent and Robert Hanggi, and settlement agreement preparation resulting in resolution of dispute; for obtaining survey of property for fence; for assistance with determining available well water on acreage; [un-totaled hours] @ attorney rates of \$225/hr and \$250/hr;)	
<input type="checkbox"/> Aff.Pub.		
<input checked="" type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters	021913	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 9202	Costs (not itemized) - \$1,347.42	
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting	Closing - \$2,000.00	
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input checked="" type="checkbox"/> FTB Notice	~Please see additional page~	
		Reviewed by: LEG
		Reviewed on: 10/12/15
		Updates:
		Recommendation:
		File 7 – Hanggi

Distribution pursuant to Decedent's Will and to Order Approving Settlement filed 4/29/2015 is to:

- **DARLENE HANGGI LIVING TRUST** – entire estate valued at **[\$88,762.49?]**, consisting of **\$5,000.00** payment from estranged spouse **ROBERT HANGGI** to the Estate of Darlene Kaye Hanggi in settlement of the saddle dispute and other monetary issues; award to **ROBERT HANGGI** of a Probate Homestead in the community property interest which the Estate has in the residence with Robert responsible for repairs, maintenance, taxes and insurance of residence; relinquishment of **ROBERT HANGGI'S** license to use the road on the Decedent Darlene Hanggi's property; relinquishment of **ROBERT HANGGI'S** license to use a water pipeline crossing Decedent Darlene Hanggi's property; **ROBERT HANGGI** will at his sole expense install a new water meter as specified in **Order Approving Settlement filed 4/29/2015**, and Estate of Darlene Haggi will install a new water meter as specified in **Order Approving Settlement filed 4/29/2015**.

Petitioner prays for an Order:

1. Approving, allowing and settling the First and Final account;
2. Ratifying, confirming and approving all acts and transactions of the Petitioner relating to matters set forth in the account;
3. Authorizing payment of the Executor and Attorney fees and commissions and closing reserve;
4. Authorizing payment of the Extraordinary Attorney fees; and
5. Distributing the estate of the Decedent remaining in Petitioner's hands to the Trustee of the **DARLENE HANGGI LIVING TRUST**.

NEEDS/PROBLEMS/COMMENTS, continued:

3. *Schedule F Disbursements* shows payments from the estate made to the Attorney. Paragraph 18 of the *Petition* states the Executor on behalf of the Trustee of the **DARLENE HANGGI LIVING TRUST** has paid to the law firm the sum of **\$3,453.62**, which is credited against the costs of administration advanced and attorney's fees, leaving unpaid the sum of **\$3,006.17**, which should be allowed. CA Rule of Court 7.700 provides the personal representative must not pay and the attorney must not receive statutory fees or fees for extraordinary services in advance of a court order authorizing their payment, and the court may impose sanctions against the personal representative or attorney, and surcharge with interest from the date of payment, the personal representative for payment of the fees in advance of court order.
4. Paragraph 18 of the *Petition* states the attorneys will advance certification and recording fees for the Judgment of Final Distribution in an unknown sum at this time, all of which should be reimbursed from the reserved being requested. No closing reserve funds shall be used for attorney fees pursuant to Local Rule 7.12.6(D).
5. *Exhibit A, Computation of Statutory Compensation* does not account for the **\$18,204.50** "loss on other disposition" described in *Schedule G* which assets were concluded to be the separate property of Decedent's spouse and thus not part of the Decedent's estate. Therefore, the statutory fee base should be **\$118,874.60** and the fee calculates as **\$4,566.24** rather than **\$5,112.37**.

~Please see additional page~

NEEDS/PROBLEMS/COMMENTS, continued:

6. Need clarification regarding the source of payment for the attorney fees and cost reimbursement based upon statement in Paragraph 21 of the Petition stating that the sum of **\$0.00** cash will remain in the estate less payments for commissions and fees, costs and closing reserve.
7. Need revised proposed order based upon the issues raised regarding incorrect calculations.

8 William Shiba (Estate)

Case No. 13CEPR00152

**Attorney Hiyama, Dean (for William Martin "Marty" Shiba – Executor – Petitioner)
 First and Final Account and Report of Executor and Petition for Its Settlement, for Allowance of
 Compensation to Executor and Attorneys for Ordinary Services and for Final Distribution**

DOD: 7/4/12	WILLIAM MARTIN (MARTY) SHIBA, Executor with Full IAEA without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 7/4/12 through 5/15/15	<p>1. Disbursements schedule includes payments related to real property (mortgage, util, maintenance); however, no real property was inventoried in this estate. Need clarification.</p> <p><i>Declaration filed 8/10/15 by Attorney Hiyama states the real property is held in the Shiba Family Trust. Because the trust did not have any accounts, maintenance expenses were paid from the estate.</i></p> <p>Update: Status Report filed 10/9/15 states Attorney Hiyama has been in contact with the Dept. of Health Care Services with regard to objections they may have and to getting a written statement that they do not object to the final distribution payout. There remain some minor issues re DHS' concerns with payments made from the estate and DHS is requesting some documentation. The Executor is gathering any and all necessary documents. Therefore at this time it is requested that hearing be continued for 60 days to allow time to reach agreement with DHS.</p>
Cont. from 081215	Accounting: \$74,985.35	
Aff.Sub.Wit.	Beginning POH: \$70,121.84	
<input checked="" type="checkbox"/> Verified	Ending POH: \$10,189.30	
<input checked="" type="checkbox"/> Inventory	Executor (Statutory): \$2,859.41	
<input checked="" type="checkbox"/> PTC	Attorney (Statutory): \$2,859.41	
<input checked="" type="checkbox"/> Not.Cred.	(Payable \$750.00 to Dean Hiyama and \$2,109.41 to Executor's former attorney, G. L. Motsenbocker)	
<input checked="" type="checkbox"/> Notice of Hrg	After payment of fees, costs, reimbursement of costs and expenses, there will be one creditor's claim from the Dept. of Healthcare Services with a balance remaining of \$495,569.42.	
<input checked="" type="checkbox"/> Aff.Mail	Petitioner requests to pay the remaining \$2,970.48 to DHS with the first \$492,548.94 of any thereafter discovered property until the claim is satisfied in full.	
Aff.Pub.	After said claim is satisfied, any other property of the estate not now known or discovered should be distributed to the four heirs in 1/4 shares each pursuant to Decedent's will.	
Sp.Ntc.		Reviewed by: skc
Pers.Serv.		Reviewed on: 10/12/15
Conf. Screen		Updates:
<input checked="" type="checkbox"/> Letters 3/29/13		Recommendation:
Duties/Supp		File 8 – Shiba
Objections		
Video Receipt		
CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
<input checked="" type="checkbox"/> FTB Notice		

Probate Status Hearing Re: Filing First Account or Final Distribution.

DOD: 1/13/13	<p>KENNETH W. PRICE was appointed Administrator with Full IAEA with bond of \$80,000.00 on 4/2/13.</p> <p>Bond was filed and Letters issued on 4/16/13.</p> <p>I&A shows the value of the estate at \$423,772.21.</p> <p>Minute Order dated 4/2/13 set this status hearing for the filing of the first account.</p> <p>Status Report filed on 10/1/15 states since the last status hearing the attorney's office has been in contact with attorney Greg Roberts. Mr. Roberts represents Michael R. Straight, the son of Virgil Straight, and the decedent's spouse.</p> <p>Issues concerning the Estate of Mariangela Straight and Virgil Straight have been resolved.</p> <p>Therefore, at this time, it is requested that a status hearing be set for an additional 30 days, in order to allow time for the Administrator to prepare and submit a petition for final distribution.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need First Account or Petition for Final Distribution.</p>
Cont. from 051315, 081915		
<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 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: 10/9/15
		Updates:
		Recommendation:
		File 9 - Straight

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

DOD: 02/17/13	STEVEN COLLINS , son, was appointed as Administrator with full IAEA and without bond on 06/19/13. Letters of Administration were issued on 06/19/13.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 08/19/15</u> Minute Order from 08/19/15 states: Counsel requests at least 45 days, and represents that he anticipates this being the last request for a continuance. As of 10/09/15, nothing further has been filed. 1. Need Account/Report of Administration and Petition for Distribution.
Cont. from 082214, 092214, 030915, 051315, 081915	Inventory & Appraisal, final, was filed on 10/22/13 - \$154,000.00	
Aff.Sub.Wit.	Report of Status of First Account Current filed 08/19/14 states: it is anticipated that the first account petition will be completed within 3 weeks. A 30 day continuance is requested.	
Verified		
Inventory	Report of Status of First Account Current filed 10/09/15 states: since the last status report, issues concerning the distribution of the bond proceeds have been resolved. A prepared final petition for distribution has been mailed to the Administrator to review and sign. It is expected that the final petition should be received back to their office on or before the hearing date of 10/14/15. If it is unable to be filed before the hearing date a 15 day continuance is requested.	
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: JF
		Reviewed on: 10/09/15
		Updates:
		Recommendation:
		File 10 – Collins

Attorney Petty, Jonathon L. (for Executor Kristen Peterson)

Probate Status Hearing Re: Filing of the First Account

DOD: 10/2/2013	<p>KRISTEN PETERSON, daughter, was appointed Executor with Limited IAEA authority without bond on 6/25/2014. Letters issued on 6/25/2014.</p> <p><i>Corrected Final Inventory and Appraisal</i> was filed 12/2/2014 showing an estate value of \$199,109.12. Pursuant to Probate Code § 12200, first account and/or petition for final distribution was due 6/25/2015. Minute Order dated 6/12/2015 from the hearing on the petition for probate set this status hearing on 8/12/2015 for filing of the first account and/or petition for final distribution. Status Report filed by Kristen Peterson on 8/10/2015 states:</p> <ul style="list-style-type: none"> Per the accountant's determination, a federal estate tax return will be required in this estate; At this time, the estate consists of proceeds of the sale of real property, which sale closed on 7/15/2015, per the Court's Order Confirming Sale of Real property; On 7/16/2015, the \$75,862.02 sale proceeds were placed into a blocked account; <i>[Receipt and Acknowledgement of Order for Deposit was filed 7/30/2015];</i> One creditor's claim was filed on 7/14/2015, almost a year after the allotted time; a rejection of the creditor's claim was filed on 8/10/2015; given the late filing of the creditor's claim, the Executor is currently preparing the First and Final Report of Executor and Petition for Final Distribution without an Accounting and Allowance for Compensation for Services, which they believe will require 60 days from the date this status report is filed to complete; Executor requests the 8/12/2015 status hearing be removed from the calendar, and requests authority to continue administration of the estate until a status hearing on or about 10/15/2015. 	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>OFF CALENDAR</p> <p>First and Final Report of Executor, etc., filed on 10/9/2015 is set for hearing on 11/19/2015.</p>	
Cont. from 081215			
Aff.Sub.Wit.			
Verified			X
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: LEG	
		Reviewed on: 10/12/15	
		Updates:	
		Recommendation:	
		File 11 – Peterson	

Petitioner Adams, Amber (Pro Per – Mother)

Petition for Termination of Guardianship

Age: 1	<p>AMBER ADAMS, mother, is petitioner.</p> <p><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 09/02/2015: Examiner notes are provided to the petitioner. The petitioner is ordered to provide her contact information to the investigator. If the investigator is unable to contact the petitioner, the Court will no grant another continuance or go forward with the petitioner.</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Termination of Guardianship for: <ul style="list-style-type: none"> • Jessika Adams (Co-Guardian) • Lance Adams, Sr. (Co-Guardian) • Father (Unknown) • Paternal Grandparents (Unknown) • Sharland Taylor (Maternal Grandmother)
Cont. from 080315. 090215		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
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<input type="checkbox"/> CI Report		
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<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: 10/09/2015
		Updates:
		Recommendation:
		File 13 – Perry

DOD: 12/28/2014	DEBORAH A. HARPER , was appointed Administrator with Full IAEA with bond of \$185,000.00 on 5/13/15.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Per the minute order of 09/23/2015 on the Status Hearing regarding the Proof of Bond, A Status Hearing was set for 10/21/2015 regarding Signed Order and Issuance of Letters.</p> <p>1. Need Inventory and Appraisal 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>
Cont. from	An Amended Order Appointing Deborah A. Harper as Administrator with Limited IAEA authority, without bond and any estate proceeds to be placed in a blocked account, was filed on 09/24/2015.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Letters of Administration were issued on 09/28/2015.	
Aff.Mail		
Aff.Pub.	Minute Order of 05/13/2015 set the Status Hearing for the filing of the Inventory and Appraisal.	
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: 10/09/2015
		Updates:
		Recommendation:
		File 14 – Harper

15 Violet Douglas & Jade Vasquez (GUARD/P)

Case No. 15CEPR00461

Petitioner Alexander, Mary Ann (Pro Per – Maternal Grandmother)

Petition for Appointment of Guardianship of the Person

Violet, age 14 Jade, age 3 Cont. from 070115, 080515, 090215		<p align="center"><u>TEMPORARY EXPIRES 09/02/2015</u></p> <p>MARY ANN ALEXANDER, Maternal Grandmother, is Petitioner.</p> <p align="center"><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 09/02/2015: Examiner notes are provided to the petitioner. With respect to item #3 in the examiner notes, the Court is informed that Dutch John Douglas is the maternal grandfather. The petitioner is directed to address items #1 and #2 in the examiner notes before the next hearing.</p> <p>Petitioner has cleared all issues in the Examiner notes.</p>										
<input type="checkbox"/>	Aff.Sub.Wit.		<table border="1"> <tr> <td colspan="2">Reviewed by: LV</td> </tr> <tr> <td colspan="2">Reviewed on: 10/09/2015</td> </tr> <tr> <td colspan="2">Updates:</td> </tr> <tr> <td colspan="2">Recommendation:</td> </tr> <tr> <td colspan="2">File 15 – Douglas & Vasquez</td> </tr> </table>	Reviewed by: LV		Reviewed on: 10/09/2015		Updates:		Recommendation:		File 15 – Douglas & Vasquez	
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Reviewed on: 10/09/2015													
Updates:													
Recommendation:													
File 15 – Douglas & Vasquez													
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<input type="checkbox"/>	Citation												
<input type="checkbox"/>	FTB Notice												

Attorney Hubbell, Marlene A. (for Petitioner Steven L. Chavez, Trustee)

Petition Seeking Order(s) Passing on Act(s) of Attorney-in-Fact, and/or Disobeying Principal's Instruction(s), and/or Affirming Real Property Title Passing by Non-Probate Transfer

Paul Moreno DOD: 6/27/2010	STEVEN L. CHAVEZ , son and Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
[Empty]	Petitioner states:	<u>Continued from 9/16/2015.</u> Minute Order states counsel requests a continuance.
Cont. from 081915, 091615	<ul style="list-style-type: none"> • Petitioner is the Trustee of the MORENO FAMILY GRANTOR TRUST established 7/23/2014 by Trustor FIDELA M. MORENO, widow of PAUL C. MORENO (copy of Trust attached as Exhibit A); • On 9/16/2009, Fidela was appointed as Attorney-in-Fact for Paul under a Durable Power of Attorney – General (copy of POA attached as Exhibit B); • This <i>Petition</i> concerns real property located on Cardinal Lane in Squaw Valley, title to ½ of which is recorded in Petitioner's name, but the chain of title has been questioned and the property cannot be sold or otherwise transferred by Petitioner without seeking appropriate orders from this Court; • EDDIE LOPEZ and YOLANDA LOPEZ are co-owners of a ½ interest in the property and desire to purchase the ½ interest held by Petitioner; • Petitioner seeks orders which affirm and establish title to the ½ interest in the property held by Petitioner; • Petitioner also seeks orders which pass on the acts of Fidela M. Moreno as Attorney-in-Fact for her former spouse Paul C. Moreno in effecting inter vivos transfer of his joint tenancy interest in the property to herself, including approval (if necessary) to disobey the principal's instructions pursuant to Probate Code § 4234(b); • In the alternative, if the acts of Fidela M. Moreno as Attorney-in-Fact are not approved, then Petitioner seeks orders to affirm and establish Fidela M. Moreno's ½ title interest in the property as passing by way of joint tenancy non-probate transfer to her as the surviving joint tenant; 	<u>Note for background:</u> Minute Order dated 8/19/2015 states in pertinent part that the Court indicates it is inclined to not grant the request. Ms. Hubbell represents that she will file an amended petition.
<input type="checkbox"/> Aff.Sub.Wit.	<ul style="list-style-type: none"> • EDDIE LOPEZ and YOLANDA LOPEZ are co-owners of a ½ interest in the property and desire to purchase the ½ interest held by Petitioner; 	<u>Note:</u> Case file contains 3 alternative proposed orders: (1) passing on the acts of Fidela Moreno as Attorney-in-Fact and affirming the transfer of title to the real property; <u>or</u> (2) only affirming transfer of title to Fidela Moreno as a valid non-probate transfer; <u>or</u> (3) denying the petition without prejudice.
<input checked="" type="checkbox"/> Verified	[Empty]	~Please see additional page~
<input type="checkbox"/> Inventory	[Empty]	Reviewed by: LEG
<input type="checkbox"/> PTC	[Empty]	Reviewed on: 10/12/15
<input type="checkbox"/> Not.Cred.	[Empty]	Updates:
<input checked="" type="checkbox"/> Notice of Hrg	[Empty]	Recommendation:
<input checked="" type="checkbox"/> Aff.Mail ^{W/}	[Empty]	File 16 – Moreno
<input type="checkbox"/> Aff.Pub.	[Empty]	[Empty]
<input type="checkbox"/> Sp.Ntc.	[Empty]	[Empty]
<input type="checkbox"/> Pers.Serv.	[Empty]	[Empty]
<input type="checkbox"/> Conf. Screen	[Empty]	[Empty]
<input type="checkbox"/> Letters	[Empty]	[Empty]
<input type="checkbox"/> Duties/Supp	[Empty]	[Empty]
<input type="checkbox"/> Objections	[Empty]	[Empty]
<input type="checkbox"/> Video Receipt	[Empty]	[Empty]
<input type="checkbox"/> CI Report	[Empty]	[Empty]
<input type="checkbox"/> 9202	[Empty]	[Empty]
<input checked="" type="checkbox"/> Order	[Empty]	[Empty]
<input type="checkbox"/> Aff. Posting	[Empty]	[Empty]
<input type="checkbox"/> Status Rpt	[Empty]	[Empty]
<input type="checkbox"/> UCCJEA	[Empty]	[Empty]
<input type="checkbox"/> Citation	[Empty]	[Empty]
<input type="checkbox"/> FTB Notice	[Empty]	[Empty]

~Please see additional page~

Petitioner states, continued:

- The written Power of Attorney appointing Fidela grants broad authority to grant, transfer or convey real property; the Power of Attorney does not contain an express grant of authority for the Attorney-in-Fact to give gifts to him or herself [language citations omitted];
- On 4/8/1981, Paul and Fidela acquired by Grant Deed an undivided ½ interest in the subject property as “husband and wife as joint tenants” (copy of Grant Deed attached as Exhibit D);
- Since 2009, the property has remained unoccupied and has not produced any income;
- On 12/3/2009, Fidela transferred by Grant Deed both her and Paul's joint tenancy interests in the property to Fidela “as her sole and separate property,” executing the Grant Deed acting as the Attorney-in-Fact for Paul (copy of Grant Deed attached as Exhibit E);
- This transfer broke the joint tenancy in which the property had been held;
- The 12/3/2009 Grant Deed cannot be cancelled, rescinded or set aside in the chain of title; absent a showing of fraud, a deed cannot be set aside and any complaining party's sole remedy is an action to recover damages;
- There are no known allegations of fraud related to the 12/3/2009 Grant Deed by anyone who has or may have an interest in the portion of the property in question;
- The 12/3/2009 Grant Deed recites the transfer was “out of love and affection,” which qualifies as adequate consideration, constituting “good consideration” in transfers by deed;
- Had the 12/3/2009 transfer of Paul's undivided interest in the property not taken place, the property interest would have transferred to Fidela upon Paul's death by operation of law, from deceased joint tenant to the surviving joint tenant, Fidela;
- On 12/3/2009, Fidela next transferred by Grant Deed her sole and separate interest in the property to Fidela as Trustee of the **FIDELA M. MORENO LIVING TRUST** (copy of Grant Deed attached as Exhibit F);
- On 7/23/2014, Fidela as Trustee of Fidela's Trust transferred the property to Fidela M. Moreno, a widow (copy of Grant Deed attached as Exhibit G);
- On 7/24/2014, Fidela, a widow, transferred an undivided 1/8th interest in the property to Petitioner in his capacity as Trustee of the **MORENO FAMILY GRANTOR TRUST** (copy of Grant Deed attached as Exhibit H);
- On 7/25/2014, Fidela, a widow, transferred an undivided 1/8th interest in the property to Petitioner in his capacity as Trustee of the **MORENO FAMILY GRANTOR TRUST** (copy of Grant Deed attached as Exhibit I);
- On 7/26/2014, Fidela, a widow, transferred an undivided 1/8th interest in the property to Petitioner in his capacity as Trustee of the **MORENO FAMILY GRANTOR TRUST** (copy of Grant Deed attached as Exhibit J);
- On 7/28/2014, Fidela, a widow, transferred an undivided 1/8th interest in the property to Petitioner in his capacity as Trustee of the **MORENO FAMILY GRANTOR TRUST** (copy of Grant Deed attached as Exhibit K);
- These 4 transfers of 1/8 interest each, were made for the purpose of divesting Fidela of any interest in assets or their value, which would disqualify her from receiving Medi-Cal benefits, for which she subsequently applied, received, and continues presently to receive and rely on to her benefit;
- Per Probate Code § 4231.5(b) [text omitted], since the only “liability” which could arise from the 12/3/2009 act of Fidela in her capacity as Attorney-in-Fact would be liability to herself as the joint surviving tenant, Petitioner asks the Court to find that Fidela acted reasonably and in good faith under the circumstances known only to her and excuse any “liability” she may have as an agent to herself as a surviving joint tenant;

~Please see additional page~

Petitioner states, continued:

- Petitioner asks the Court find that Fidela was not in violation of her fiduciary duties with regards to the 12/3/2009 Grant Deed, whereas Paul Moreno's interest would have nonetheless transferred to her by operation of law upon his death;
- With Court approval, the attorney-in-fact may disobey instructions of the principal (Probate Code § 4234(b); Petitioner asks the Court to approve the 12/3/2009 transfer of interest in the property to herself as an individual despite that no such express authority appears in or was given as an authorizing instruction in the Power of Attorney;
- Petitioner holds record title to a ½ interest in the property and desires to sell the property interest to co-owners, **EDDIE LOPEZ** and **YOLANDA LOPEZ**, who desire to purchase the property at a previously-appraised and mutually agreed-upon value;
- However, the title company presently holding an open escrow refuses to issue a policy of title insurance to the Lopez buyers without a Court order addressing the 12/3/2009 transfer by Attorney-in-Fact Fidela Moreno, contending the transfer appears "self-interested";
- A separate proceeding was commenced on 2/3/2015 by co-owners Eddie Lopez and Yolanda Lopez (15CECG00356) which does not seek to quiet title to the property but only seeks judicial determination of the validity of the 12/3/2009 Grant Deed, Partition by Sale of the Subject Property and a "determination of the interests according to the respective rights of the parties" (see *Request for Judicial Notice* filed 7/8/2015);
- Co-owners Eddie Lopez and Yolanda Lopez are not requesting abatement of this Petition pursuant to Probate Code § 854 and protracted litigation is unnecessary, with the Petition presenting as the most economical and expedient means of resolution of the transfer in question.

Petitioner requests an Order:

1. Passing on the acts of and affirming Fidela Moreno's 12/3/2009 transfer of Paul Moreno's interest in the property to Fidela Moreno by the power vested in her as Attorney-in-Fact for Paul Moreno, finding that Fidela Moreno acted reasonably and in good faith under the circumstances known only to her and is excused from any liability she may have as an agent;
2. Finding that Fidela Moreno was not in violation of her fiduciary duties as Attorney-in-Fact for Paul Moreno with regards to the 12/3/2009 Grant Deed executed by her as his Attorney-in-Fact;
3. Passing on the acts of and affirming Fidela Moreno's 12/3/2009 transfer of Paul Moreno's interest in the property to Fidela Moreno despite that this power was not expressly provided for in, or which was in disobedience of instructions in, the durable Power of Attorney – General executed by Paul Moreno; and
4. Affirming Fidela Moreno's title as the surviving joint tenant to the portion of the property held by Paul Moreno upon his death as a valid non-probate transfer of title.

NEEDS/PROBLEMS/COMMENTS, continued:

1. Pursuant to Probate Code § 17201, *Petition* does not but should state the names and addresses of each trust beneficiary and all persons entitled to notice of the *Petition*. *Proof of Service by Mail* filed 7/8/2015 shows service was made on 7/8/2015 to 5 persons whose names should be identified in the *Petition*, and to Attorney **ROBERT C. ABRAMS**.
2. Petition explains that the 4 transfers of 1/8 interest each in the real property were made for the purpose of divesting Fidela of any interest in assets or their value, which would disqualify her from receiving Medi-Cal benefits. The explanation for the close succession of transfers made to avoid disqualifying Fidela Moreno from Medi-Cal benefits does not provide adequate explanation for future recoupment by Medi-Cal.

Petitioner Tapia, Tony, Jr. (pro per – non-relative)
 Petitioner Tapia, Kimiki S. (pro per – maternal aunt)

Petition for Appointment of Guardian of the Person

Age: 6	<u>TEMPORARY EXPIRES 10/14/15</u>	NEEDS/PROBLEMS/COMMENTS:
	TONY TAPIA, JR., non-relative, and KIMIKI TAPIA, maternal aunt, are Petitioners.	1. Need <i>Notice of Hearing</i> .
	Father: EUSEBIO MIRELES – <i>Declaration of Due Diligence filed 08/24/15</i>	2. Need proof of service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for:
Cont. from	Mother: CRYSTELLE VALENZUELA – <i>Consent & Waiver of Notice filed 09/21/15</i>	a. Eusebio Mireles (father) – <i>personal service needed</i>
<input type="checkbox"/> Aff.Sub.Wit.	Maternal grandparents: UNKNOWN	b. Paternal grandparents – <i>service by mail ok</i>
<input checked="" type="checkbox"/> Verified	Maternal grandfather: NOT LISTED	c. Maternal grandfather – <i>service by mail ok</i>
<input type="checkbox"/> Inventory	Maternal grandmother: MICHELLE MAYEDA	d. Michelle Mayeda – <i>service by mail ok</i>
<input type="checkbox"/> PTC	Sibling: BRIANNA MADRIGAL (16)	e. Brianna Madrigal (sister) – <i>service by mail ok</i>
<input type="checkbox"/> Not.Cred.	Petitioners state [see Petition for details].	
<input type="checkbox"/> Notice of Hrg x	Objection to Guardianship filed 09/29/15 by Eusebio Mireles, Jr. (father) [see file for details].	
<input type="checkbox"/> Aff.Mail x	Court Investigator Dina Calvillo filed a report on 10/08/15.	
<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		
		3. UCCJEA form filed on 8/11/2015 does not provide residence information for the last 5 years as required.
		Reviewed by: JF
		Reviewed on: 10/09/15
		Updates:
		Recommendation:
		File 17 – Valenzuela

18A Josephina Lemus (GUARD/P)

Case No. 15CEPR00786

Petitioner: Maria G. Lemus Cisneros (pro per)

Competing Petitioner: Jose Rene Mendoza, JR (pro per)

Petition for Appointment of Temporary Guardian

		GENERAL HEARING 10/21/15	NEEDS/PROBLEMS/COMMENTS:
		MARIA G. LEMUS , paternal aunt, is petitioner.	
		Please see petition for details.	
Cont. from 090215			
<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	N/A	
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<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	N/A	
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<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
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<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: 10/9/15
			Updates:
			Recommendation:
			File 18A – Lemus

18A

18B Josephina Lemus (GUARD/P)

Case No. 15CEPR00786

Petitioner: Jose Rene Mendoza, JR (pro per)

Competing Petitioner: Maria G. Lemus Cisneros (pro per)

Petition for Appointment of Guardian of the Person

		<p>THERE IS NO TEMPORARY. Petitioner did not request a temporary.</p> <p>JOSE MENDOZA, non-relative/mom's boyfriend, is petitioner.</p> <p>Please see petition for details.</p> <p>DSS Social Worker Report filed on 10/8/15</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal 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. Pablo Lemus Cisneros (father) 3. Need proof of service of the Notice of Hearing along with a copy of the petition or Consent and Waiver of Notice of Declaration of Due Diligence on: <ol style="list-style-type: none"> a. Jose G. Lemus (paternal grandfather) b. Josephina Lemus (paternal grandmother) c. Maternal grandfather d. Leticia Hernandez (maternal grandmother)
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 type="checkbox"/>	Aff.Mail	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	<input checked="" type="checkbox"/>	
<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		
<p>Reviewed by: KT</p> <p>Reviewed on: 10/9/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 18B – Lemus</p>			

18B

Petition for Appointment of Guardian of the Person

Age: 5	<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS: 1. Need <i>Notice of Hearing</i> . 2. Need proof of service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for: a. Anthony Juan Gutierrez (father) – <i>personal service needed; Declaration of Due Diligence filed 08/24/15 states that the father is unknown to Petitioner. Mother told Court Investigator that the father's name is Anthony Juan Gutierrez.</i> b. Margaret Cedillo – <i>personal service needed</i> c. Paternal grandparents – <i>service by mail ok</i>
	CRYSTAL CEDILLO, maternal aunt, is Petitioner.	
	Father: UNKNOWN (ANTHONY JUAN GUTIERREZ) – <i>Declaration of Due Diligence filed 08/24/15</i>	
Cont. from	Mother: MARGARET CEDILLO	
Aff.Sub.Wit.	Paternal grandparents: NOT LISTED	
✓ Verified	Maternal grandfather: JESS CEDILLO – <i>Consent & Waiver of Notice filed 08/24/15</i>	
Inventory	Maternal grandmother: CYNTHIA CEDILLO – <i>Consent & Waiver of Notice filed 08/24/15</i>	
PTC	Petitioner states [see Petition for details].	
Not.Cred.	Court Investigator Dina Calvillo filed a report on 10/08/15.	
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: JF
		Reviewed on: 10/09/15
		Updates:
		Recommendation:
		File 19 – Cedillo

The Survivor's Trust consists of the surviving settlor's separate property and her share of the community property and quasi-community property, as well as the minimum amount necessary to bring the balance of the Trust estate within the allowable marital deduction for federal estate tax purposes. The Residual Trust is to be funded with the balance of the Trust estate. Further, the Trust requires that, to the extent possible, a specific parcel of real property, commonly referred to as the "Vineyard Property" shall be allocated to the Residual Trust.

In regards to the Residual Trust, the Trust instrument requires that the assets of said subtrusts are to be immediately divided into equal shares and distributed to the Settlor's three children: Robert L. Adrian ("Robert"), Carol L. Skandera ("Carol"), and Robin Al Tilghman ("Robin").

Petitioner alleges the Co-Trustees have continued to administer the Trust since the death of Settlor George W. Adrian.

More than three years have passed since the death of Co-Settlor George W. Adrian in March 2012, and the beneficiaries of his share of the Trust estate have not received an accounting or distribution despite repeated requests over many months. As such, Petitioner Robert L. Adrian respectfully requests that this Court compel Co-Trustees Patricia Binns and Margaret A. Adrian to account and Report to the beneficiaries of the Residual Trust and to distribute the assets of the Residual Trust pursuant to its terms.

Wherefore, Petitioner Robert L. Adrian respectfully requests and Order from this court:

1. Instructing Margaret A. Adrian and Patricia Binns, in their capacities as Co-Trustees of the George W. and Margaret A. Adrian Revocable Trust and the Residual Trust created thereunder, to file and serve a first and final account and report of the administration of the Residual Trust and petition for final distribution within thirty (30) days;
2. Awarding Petitioners such fees and costs as are allowed by law; and
3. For any relief the court deems just and proper.

21 Kiana Price, Samantha Price (GUARD/P) Case No. 15CEPR00963

Petitioner Williams, Lareasa Darnell (Pro Per – Paternal Aunt)

Petition for Appointment of Temporary Guardian of the Person

Kiana Age: 16	<u>GENERAL HEARING 12/08/2015</u>	NEEDS/PROBLEMS/COMMENTS:
Samantha Age: 14	LAREASA DARNELL WILLIAMS, paternal aunt, is petitioner.	<ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service five(5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Temporary Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Tyson Price (Father) • Maria De'Arman Prieto Price (Mother) • Kiana Price (Minor) • Samantha Price (Minor)
Cont. from	<u>Please see petition for details</u>	
<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	n/a	
<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 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: 10/12/2015
		Updates:
		Recommendation:
		File 21 – Price

Petitioner Whitmire, Paula Jean (pro per – daughter)
 Attorney Fanucchi, Edward L. (Court appointed for conservatee)

Petition for Appointment of Temporary Conservator of the Person

Age: 88	<u>GENERAL HEARING: 11/05/15</u>	NEEDS/PROBLEMS/COMMENTS:
	PAULA JEAN WHITMIRE, daughter, is petitioner and requests appointment as Temporary Conservator of the Person.	Court Investigator advised rights on 10/02/15.
Cont. from	Petitioner states [see file for details].	1. Need proof of service by mail at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Conservator of the Person</i> or <i>Consent & Waiver of Notice</i> or <i>Declaration of Due Diligence</i> for:
<input type="checkbox"/> Aff.Sub.Wit.	Court Investigator Dina Calvillo filed a report on 10/09/15.	a. Marian Cornelison (daughter)
<input checked="" type="checkbox"/> Verified		b. Paul Garoppo, Jr. (son)
<input type="checkbox"/> Inventory		c. Kathy Mendez (granddaughter)
<input type="checkbox"/> PTC		d. Rodgers Walton (grandson)
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<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		
<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 type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 10/12/15
		Updates:
		Recommendation:
		File 22 – Garoppo

Crystal Age: 16	<u>GENERAL HEARING 12/10/2015</u>		NEEDS/PROBLEMS/COMMENTS: 1. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Temporary Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> Crystal Garcia (Minor)
Tiffany Age: 10	MARIA GONZALEZ, maternal aunt, is petitioner.		
	<u>Please see petition for details</u>		
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 type="checkbox"/> Aff.Mail	n/a		
<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 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: 10/12/2015
			Updates:
			Recommendation:
			File 23 – Garcia/Luna

24 Payton Almaguer (GUARD/P) Case No. 15CEPR00985

Petitioner Beckham, Christy Dawn (Pro Per – Aunt)

Petitioner Barnes, Scott Anthony (Pro Per – Aunt’s Fiance)

Petition for Appointment of Temporary Guardian of the Person

Age: 11		<p align="center"><u>GENERAL HEARING 12/14/2015</u></p> <p>CHRISTY DAWN BECKHAM, aunt, and SCOTT ANTHONY BARNES, aunt's fiancé, are petitioners.</p> <p align="center"><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Temporary Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Noel Almaguer (Father) 3. Page #5 of the Guardianship Petition – Child Information Attachment (GC 210(CA)) which pertains to whether the child has Native American Ancestry was not completed. Need declaration with page #5 attached. 	
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			n/a
<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 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			
<p>Reviewed by: LV</p>				
<p>Reviewed on: 10/12/2015</p>				
<p>Updates:</p>				
<p>Recommendation:</p>				
<p>File 24 – Almaguer</p>				

Marilyn Age: 13	<p align="center"><u>GENERAL HEARING 12/16/2015</u></p> <p>LINDA CHAVEZ, half-sister, is petitioner.</p> <p align="center"><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Temporary Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Lupe (Father of Marilyn) 2. UCCJEA is incomplete. Need minors' residence information for the past 5 years. 	
Victoria Age: 10			
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 type="checkbox"/> Aff.Mail			n/a
<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 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: 10/12/2015	
		Updates:	
		Recommendation:	
		File 25 – Cruz	

Petition for Visitation

	CHRISTINA RODRIGUEZ , mother, is petitioner.		NEEDS/PROBLEMS/COMMENTS:
	MARY JOHNSTON , paternal grandmother, was appointed guardian of Justin, Matthew and Jazlin on 7/22/13.		
	Please see petition for details.		<p>This Petition is for JUSTIN, MATTHEW and JAZLIN ONLY.</p> <p>Continued from 10/7/15. Minute order states Mary Johnston represents that she went to Spirit of Woman on 10/3/15 for the orientation as ordered on 9/23/15 but arrived one hour late. The Court orders that Ms. Johnston has one week to set up an appointment to speak with someone at the program and reschedule orientation. The Court further orders that if Christina Rodriguez is more than 15 minutes late in making a phone call to the minors, then she forfeits that phone call. Ms. Rodriguez submits proof of drug tests in open court; she is directed to properly file them in the future.</p> <p>Note: Father, Jose Quintero, has filed a petition for visitation that is set for hearing on 11/18/15.</p>
	Cont. from 092315, 100715		
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
	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: 10/9/15
			Updates:
			Recommendation:
			File 26A – Levato & Quintero

Petition for Visitation Modification

		<p>MARY JOHNSTON, paternal grandmother/guardian of Justin, Matthew and Jazlin, is petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>This Petition is for JUSTIN, MATTHEW and JAZLIN ONLY.</p>
		<p>Please see petition for details.</p>	<p>Continued from 10/7/15. Minute order states Mary Johnston represents that she went to Spirit of Woman on 10/3/15 for the orientation as ordered on 9/23/15 but arrived one hour late. The Court orders that Ms. Johnston has one week to set up an appointment to speak with someone at the program and reschedule orientation. The Court further orders that if Christina Rodriguez is more than 15 minutes late in making a phone call to the minors, then she forfeits that phone call. Ms. Rodriguez submits proof of drug tests in open court; she is directed to properly file them in the future.</p>
<p>Cont. from 092315, 100715</p>			
	Aff.Sub.Wit.		<p>Note: Father, Jose Quintero, has filed a petition for visitation that is set for hearing on 11/18/15.</p> <p>Reviewed by: KT</p> <p>Reviewed on: 10/9/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 26B – Levato & Quintero</p>
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
	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		