

Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for Failure to File a First Account or Petition for Final Distribution

	<p>LEON Y. GEORGE, father, and ARMEN L. GEORGE, brother, were appointed as Co-Administrators with Full IAEA without bond and Letters issued on 1-25-05.</p> <p>Inventory and Appraisal Partial No. 1 was filed on 01/09/2015 indicating real property valued at \$160,000.00 and personal property valued at \$1,500.00.</p> <p>Final Inventory and Appraisal Partial No. 2 was filed 04/20/2015 indicating personal property valued at \$139,728.83</p> <p>No accounting or petition for final distribution was ever filed pursuant to Probate Code §12200.</p> <p>Minute Order of 04/20/2015 set this status hearing. Minute Order states: Mr. Simonian represents that he has the completed Final Inventory and Appraisal with him and he will file it directly after this proceeding. Mr. George requests 45 days; the OSC is vacated. If the petition is filed at least two court days prior, then no appearance is necessary on 06/15/2015.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 09/28/2015: Counsel represents that the paperwork for probating the father's estate is still with the Administrator; he anticipates its return this week. No appearance is necessary on 10/19/2015 if the petition is filed at least two court days prior.</p> <p>1. Need First Account or 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.</p>
Cont. from: 061515, 071615, 082415, 092815		
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		
	<u>Please see additional page</u>	
		Reviewed by: LV
		Reviewed on: 10/14/2015
		Updates:
		Recommendation:
		File 1 - George

Status Report filed 09/25/2015 for previous hearing states the Petition for Final Distribution of the Decedent's estate has been prepared and forwarded to the Administrator for signature. Waivers of Accounting by all heirs of the Decedent have been prepared and forwarded for their respective signatures. As of this date, they have not been returned to allow for filing with this Court prior to the scheduled Status Hearing. The sole heirs of the Decedent under the laws of intestate succession are his parents, Leon Y. George (deceased) and Louise K. George. The Decedent's estate is solvent. All creditor claims that have been filed are to be allowed. The claim of the Franchise Tax Board is being resolved and it is anticipated that a withdrawal/dismissal of claim will be obtained from the Franchise Tax Board and filed with this Court prior to the hearing on the Petition for Final Distribution. The claim of MBNA America in the amount of \$8,671.45 has been resolved. The claim of Discover Financial in the amount of \$8,041 has been resolved. Mr. Simonian is in the process of obtaining a withdrawal/dismissal of the claims from these creditors.

Mr. Simonian will be attending the status hearing scheduled for 09/28/2015, and can address any additional questions.

Age: 11	NORA YERENA , maternal aunt, was appointed as Guardian of the Person on 01/04/12.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED TO 12/14/15</u> Per request of counsel
		<p>1. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>First Amended Petition to Transfer Proceedings to Santa Cruz County</i> pursuant to Probate Code § 2214 <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:</p> <ol style="list-style-type: none"> a. Heather Huffman (mother) b. Jessie Collins (father) c. Connie Huffman (maternal grandmother) d. Earnest Hamm (maternal grandfather) e. Paternal grandparents <p>Note: It is noted that Notice of Hearing was mailed to Heather Huffman and Connie Huffman on 08/28/15, however the proof of service does not indicate that a copy of the Petition was included with the Notice of Hearing.</p> <p>Note: If the Petition is granted, a status hearing will be set as follows:</p> <ul style="list-style-type: none"> • Monday, January 4, 2016 at 9:00am in Dept. 303 for confirmation of receipt of transfer
Cont. from	Petitioner filed a First Amended Petition to Transfer Proceedings to Santa Cruz County, California on 08/19/15 requesting that this proceeding be transferred to Santa Cruz County pursuant to Probate Code §§ 2210 et seq. Petitioner states that the Guardian and minor both reside in Santa Cruz County and the biological mother, Heather Huffman, resides in Monterey County. Petitioner is employed as a doula, providing services and support to women during childbirth. As part of her job, she is on call and must immediately attend to her clients when they go into labor. Petitioner is also a mother and the care provider for her own children in addition to the minor.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w/o	
<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	Petitioner states that it is a burden to take time off of work to travel to Fresno to attend hearings in this case. The travel time requires Petitioner to have to make other arrangements to ensure that all of the children under her care are fed and make it to school in a timely manner. This burden would be significantly lessened if the proceedings were moved to Santa Cruz County. Petitioner has attempted to use CourtCall, but the service is expensive.	
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order	Now that the mother has moved to Monterey County, the minor has no contact in Fresno County.	
<input type="checkbox"/> Aff. Posting	Petitioner prays for an Order transferring this proceeding to the Superior Court of California, County of Santa Cruz.	
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 10/13/15
		Updates: 10/16/15
		Recommendation:
		File 2 – O’Ryan

DOD: 9/18/2007		LAURA DOZIER , surviving spouse/Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Continued from 8/17/15. Minute order states Counsel represents that he is still negotiating with the credit union and requests 60 days.
		Account period: 2/4/2008 – 9/30/2013	
Cont. from 121113, 020314, 022414, 032414, 042114, 051914, 063014, 090314, 042715, 062215, 081715		Accounting - \$650,755.95 Beginning POH- \$650,750.00 Ending POH - \$338,000.00	<p>1. Petition states the real property on South Cornelia was a single family residence, having been acquired by the decedent prior to his marriage (in April of 2006) to petitioner. Following the decedent's death, Petitioner continued to reside in the home with her sons, and over the next fifteen months paid the mortgage, taxes and insurance on the property. Petitioner was unable to continue to make the payments and as a result the home was foreclosed upon. Petitioner is requesting reimbursement of \$25,050.00 for paying the mortgage from her personal funds. The petitioner and her sons received a benefit from living in the estate property. It appears that the payments towards the mortgage could be considered rents for living in the estate's real property and therefore not reimbursed. - See declaration filed 10/27/14.</p> <p style="text-align: center;">Please see additional page</p>
<input type="checkbox"/>	Aff.Sub.Wit.	<p>Petitioner states certain assets that were decedent's separate property constitute exempt personal property eligible to be set aside to the surviving spouse pursuant to Probate Code §6510. Petitioner requests the court set aside the following personal property</p> <ul style="list-style-type: none"> • 2005 KTM Motorcycle <p>Petitioner alleges prior to his death, the decedent had given the motorcycle to Petitioner's son, Chris Johnson. Although the motorcycle had been given to Chris, title remained in the name of the decedent. Petitioner requests the court set aside the motorcycle to Petitioner (and Petitioner will confirm transfer to her son, Chris). In the alternative, Petitioner requests that the court confirm the gift of the motorcycle made prior to the decedent's death.</p> <p>Petitioner states the estate is not yet in a position to close. An action was filed on a rejected creditor's claim. The estate defaulted. The estate now is reviewing the situation to see whether it is possible to file a motion to set aside the default. Petitioner believes it will take an additional 4-6 months to close the estate.</p> <p style="text-align: center;">Please see additional page</p>	
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail W/		
<input type="checkbox"/>	Aff.Pub.		
<input checked="" type="checkbox"/>	Sp.Ntc. W/		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters 2/4/08		
<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		
			<p>Reviewed by: KT</p> <p>Reviewed on: 10/14/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 3 – Dozier</p>

Petitioner prays for an order:

1. That the First Amended First Account and Report of Petitioner be settled, allowed and approved as filed;
 2. That all actions of Petitioner as Administrator, as set forth in the petition, account and report be ratified, confirmed and approved;
 3. That the Court confirm reimbursement to petitioner of costs and expenses in the amount of \$17,480.00, and that petitioner is owed a balance of \$35,758.09;
 4. That the exempt personal property described in the petition be set aside to the surviving spouse or alternatively that the gift of the exempt property to Chris Johnson prior to the decedent's death be ratified, and confirmed;
 5. That the administration of the estate continue.
-

NEEDS/PROBLEMS/COMMENTS (cont.):

2. Petition does not indicate whether or not the residence was marketed for sale during the 15 months Petitioner and her sons resided there after the decedent's death. Probate Code §9600 states the personal representative shall manage the estate to the extent that ordinary care and diligence require that the power be exercised. It appears that ordinary care would include marketing the property for sale rather than letting the property be foreclosed upon. Need more information regarding this property. Was there any attempt to sell the property? - See declaration filed 10/27/14

The declaration filed 10/27/14 raised additional questions.

1. Mr. Knudson states the Madera County property has been used to graze cattle and is not currently producing income. Was it ever producing income? No income is listed on the receipt schedule for cattle grazing.

Declaration filed on 10/27/14 states the residence on North Cornelia was appraised at \$285,000 at the date of death. However, at the time it had two mortgages against it – one for \$250,338.60 and a second mortgage in the approximate amount of \$33,400.00. Decedent died just prior to the downturn in the market. Mrs. Dozier made the payments on the loans (\$1,370.00 and \$300.00 respectively) for 15 months. Mrs. Dozier tried to communicate with the bank after they began foreclosure proceedings, but they were unwilling to speak with her as administrator – nor were they willing to consider any loan modifications. The property was foreclosed on in October 2009. Public records indicate it sold for \$90,000.00.

Attorney Knudson states he considered filing for a probate homestead on behalf of his client, but that would have required Mrs. Dozier to take the property subject to the liens against it. It was determined that there was no benefit to her in requesting a probate homestead due to the encumbrances against the property.

Attorney Knudson states the Examiner questions whether or not Mrs. Dozier's request for reimbursement should be offset by the fair rental value of the property. Mr. Knudson states he is informed that the rental property was then not in excess of \$1,000 a month. Even with an offset for rental value, the administrator has made additional payments in trying to preserve the estate asset in the amount of \$10,500 over and above the rental value, and should receive credit for that amount of expenses paid.

Declaration filed on 10/27/14 (continued): With respect to the creditor's claim. Mr. Knudson is in negotiations with Fresno County Federal Credit Union, and will soon be filing a motion to set aside the default.

Mrs. Dozier has been advancing funds for the payment on taxes on the Madera County real property; it is not presently listed for sale because there does not seem to be any current market. While it has been used by third parties for grazing cattle, recent thefts of cattle in the area have curtailed its use, and it is not presently producing income.

Declaration filed on 4/23/15 states an offer of compromise of the creditor's claim has been received by Fresno County Federal Credit Union and is being considered by the Administrator; hopefully the issues will be resolved within the next 30 days. The estate's real property in Madera County is in escrow. The escrow agent confirms that the sale is due to close prior to the end of April 2015. Wherefore is it respectfully requested that the First Account be settled.

Declaration filed on 6/18/15 states at the hearing on 4/27/15, attorney appeared and advised the court that negotiations were continuing with Fresno County Federal Credit Union concerning the creditor's claim. Those negotiations are ongoing and will hopefully be resolved within two weeks. The Madera real property was sold and escrow closed 4/28/15. Administrator received a check for \$92,377.89. Finalization of the settlement of the Fresno County Federal Credit Union escrow is the remaining issue. Attorney Knudson requests continuance of 60 days to close the estate.

Note: If the petition is granted the court will set a status hearing for the filing of the petition for final distribution on **Wednesday, February 24, 2016 at 9:00 a.m. in Dept. 303.**

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

Second Account and Report of Conservator; Petition for Allowance of Fees to Conservator and Allowance of Attorney Fees

Age: 97	<p>DIANE MOSOLF, Conservator, is Petitioner.</p> <p>Account period: 03/01/13 – 04/30/15</p> <p>Accounting: \$1,684,448.47 Beginning POH: \$1,181,504.44 Ending POH: \$1,348,051.73</p> <p>Conservator: \$1,768.40 (88.42 hours @ \$20/hr.)</p> <p>Attorney: \$14,185.83 (112.5 paralegal hours @ \$110/hr. and 8.08 attorney hours @ \$250/hr.)</p> <p>Current bond: \$260,745.70 (Petitioner states that bond is sufficient for the assets on hand because the Court ordered blocking of certain accounts in lieu of posting a bond)</p> <p>Petitioner prays for an Order:</p> <ol style="list-style-type: none"> Approving, allowing and settling the second account; and Authorizing the conservator and attorney fees and commissions. <p>Court Investigator Jennifer Daniel filed a report on 06/22/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> There are errors on the summary of account causing the charges and the credits to not balance. Some of the figures listed on the summary of account do not match what is stated on the schedules. (e.g. line 3 on the Summary of Account (Receipts) lists \$560,239.67, however schedule A lists \$360,239.67.) Need amended Petition. The beginning Property on hand does not match the ending property on hand from the first accounting. The attorney fee request includes billing for 60 hours for "Account Reconciliation" and 40 hours for the preparation of the second account (paralegal time @ \$110/hr.). The Court may require more information as to why the account reconciliation and preparation of the second and final account took so much time for this relatively routine accounting that contains errors. (Total billing for these two tasks = \$11,000.00). Disbursements from the Bank of the West Account ending in 9340 show 25 charges of \$2.50 each for "Image Copy Fee". The Court may require more information as to what these charges were for.
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 2620(c)		
<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		
Continued on Page 2		
		Reviewed by: JF
		Reviewed on: 10/14/15
		Updates: 10/16/15
		Recommendation:
		File 4 – Fratis

Declaration of Dean Hiyama in Support of Second Account and Report of Conservator filed 10/16/15 states:

- The wrong summary of account was filed; all errors will be corrected in an Amended Petition
- The cash assets on hand at the beginning of the second account did not match the ending cash assets from the first account because there errors in the amounts listed as cash on hand at the end of the first account. The first account period was supposed to cover 02/17/12 – 02/28/13. After review of the paperwork and financial statements of the First Account, it appears that the amounts listed were ending balances as of 01/31/13.
- The attorney and paralegal fees are no excessive for the fact that this attorney and his staff are substituting in for the previous attorney who passed away. The new staff had to familiarize themselves with the file. The time listed was the actual time spent working on the file during the second account period.
- Each \$2.50 charge on the Bank of the West account was the charge for a paper form of the account statement.

	<p>GERALD ISHII, Beneficiary and Co-Trustee, filed Petition of Beneficiary to Remove Successor Co-Trustees, Appoint Temporary Successor Trustee, and for Payment of Attorneys' Fees and Costs on 5-17-12. The petition was set for hearing on 7-2-12.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
<p>Cont from 041315, 041315, 071315</p>	<p>LESLIE ISHII, Beneficiary and Co-Trustee, filed Objection on 6-21-12. Petitioner replied to the Objection on 6-25-12.</p>	
<p>Aff.Sub.Wit.</p>	<p>The hearing on 7-2-12 was continued numerous times, and after numerous status and settlement hearings, at the settlement conference hearing on 1-5-15, the parties represented that they are working on agreement, and the Court set this status hearing re the agreement.</p>	
<p>Verified</p>	<p>Status Declaration of Leigh Burnside filed 7/7/15 states a draft settlement has been reviewed and Gerald Ishii's attorney Jay M. Kelly, has been provided with comments and revisions. Once the parties decide on the matter of the lot line adjustment, Ms. Burnside anticipates that the settlement agreement can be finished. While the attorney understands this matter has been pending before the court for a very long time, she does believe the parties are trying to work toward a resolution.</p>	
<p>Inventory</p>	<p>Status Declaration of Leigh Burnside filed 10/9/15 states the line proposed by Gerald Ishii is located too close in proximity to Les Ishii's water pump and filters. The application was submitted to the County of Fresno's Dept. of Public Works and Planning without first obtaining the consent of Les Ishii to the location. She has written to counsel numerous times to discuss this issue, but counsel has failed to engage in any discussions. No response was received to her letter (attached). Ms. Burnside is informed by her client's accountant that he and Mr. Jeffries, Gerald's accountant, plan to continue discussing the matter later this month, but has no information that Gerald has reconsidered his position on the proposed lot line.</p>	
<p>PTC</p>	<p>SEE PAGE 2</p>	
<p>Not.Cred.</p>	<p>Reviewed by: skc</p>	
<p>Notice of Hrg</p>	<p>Reviewed on: 10/14/15</p>	
<p>Aff.Mail</p>	<p>Updates:</p>	
<p>Aff.Pub.</p>	<p>Recommendation:</p>	
<p>Sp.Ntc.</p>	<p>File 5 – Ishii</p>	
<p>Pers.Serv.</p>		
<p>Conf. Screen</p>		
<p>Letters</p>		
<p>Duties/Supp</p>		
<p>Objections</p>		
<p>Video Receipt</p>		
<p>CI Report</p>		
<p>9202</p>		
<p>Order</p>		
<p>Aff. Posting</p>		
<p>Status Rpt</p>		
<p>UCCJEA</p>		
<p>Citation</p>		
<p>FTB Notice</p>		

Page 2

Status Report filed 10/14/15 by Attorney Fanucchi states it was his understanding that both accountants were under an Oct. 15 general tax deadline and agreed to make this matter a priority after that date. His office was recently informed that they have discussed possible resolutions regarding the lot line adjustment in question, and it was Mr. Fanucchi's understanding that no further discussions needed to take place with opposing counsel unless some progress had been made regarding the settlement. Therefore, an extension to negotiate the settlement is requested.

Dept. 303, 9:00 a.m. Monday, October 19, 2015

Second and Final Account and Report of Conservator

DOD: 01/08/15	BROOKE A. CASTLE, Conservator, is	NEEDS/PROBLEMS/COMMENTS:
	Petitioner.	
	Account period: 09/22/14 – 06/22/15	CONTINUED FROM 09/21/15
	Accounting: \$43,607.28	Minute Order from 09/21/15
Cont. from 081015, 083115, 092115	Beginning POH: \$20,286.77	states: Ms. Johnson reports that
Aff.Sub.Wit.	Ending POH: \$7,928.46	she is awaiting the return of the
✓ Verified	Conservator: waived	PC § 13100 affidavit with the
Inventory	Attorney: \$1,250.00 (ok per	Trustee's signature; she requests 3
PTC	Local Rule)	weeks.
Not.Cred.	Petitioner prays for an Order:	As of 10/13/15, nothing further has
✓ Notice of Hrg	1. Settling and allowing this second	been filed.
✓ Aff.Mail w/	and final account and confirming	1. Need Affidavit for
Aff.Pub.	the acts of the petitioner as	Collection or Transfer of
Sp.Ntc.	conservator;	Personal Property from
Pers.Serv.	2. Authorizing the attorney's fees;	Clayton James Stott
Conf. Screen	and	pursuant to Probate Code
Letters	3. Authorizing Petitioner to turn over	§ 13100.
Duties/Supp	the remaining assets of the	
Objections	conservatorship estate to Clayton	
Video Receipt	James Stott, successor trustee of	
CI Report	The Patricia Stoll Gregory Stott	
✓ 2620(c)	Survivor's Trust.	
✓ Order	Supplement to Second and Final Account	
Aff. Posting	and Report of Conservator filed 08/10/15	
Status Rpt	states: There is currently existing a trust	Reviewed by: JF
UCCJEA	known as the "Patricia Stoll Gregory Stott	Reviewed on: 10/13/15
Citation	Survivor's Trust" to which reference is	Updates:
FTB Notice	made in the report. The last will of	Recommendation:
	Patricia Stoll Gregory Stott was signed	File 6 - Stott
	01/03/08 and references the "Don	
	Claypool Stott and Patricia Stoll Gregory	
	Stott 1986 Family Declaration of Trust, as	
	Amended. The Patricia Stoll Gregory Stott	
	Survivor's Trust is established by the	
	deceased conservatee on 02/15/13 with	
	her share of the assets of the original Stott	
	Family Trust. The Will could not reference	
	the Survivor's Trust, as it was not created	
	until 02/15/13.	
	Continued on Page 2	

However, there have been no other or later will found by the conservator. Therefore, this is the only will that can be presented to the court and is the intention of the surviving settlor (decedent, Patricia Stott) to dispose of assets that were under her ownership and control under the terms of the original trust. Under the terms of the original 1986 trust, the surviving settlor, had the exclusive right to the assets assigned to the surviving spouse (the Survivor's Trust) and could amend or alter it at her discretion. Except for the assets currently held by conservatee, all other assets of the decedent are currently held by Clayton James Stott as the successor trustee of the Survivor's Trust. Mr. Stott, as trustee, has appeared in this matter. He is currently represented by Summer Johnson who has also appeared in this matter on Mr. Stott's behalf.

Any declaration of trustee required by Local Rule 7.12.5 would have to be filed by Mr. Stott, as trustee, and submitted to the Court. Mr. Stott has appeared in this matter multiple times and has been the trustee of the Survivor's Trust since December 2012, prior to the death of the conservatee. Any such information that is needed from Mr. Stott under Local Rule 7.12.5 cannot be filed by the conservator. However, information already in the court's file confirms that Clayton James Stott has been and currently is the acting trustee of the Survivor's Trust. (Notification by Trustee Pursuant to Probate Code § 16061.7 attached).

The Affidavit Procedure pursuant to Probate Code § 13100 would have to be prepared by the successor trustee, Mr. Stott, however, that is unnecessary in this action as the conservator need only transfer the conservatorship's remaining assets (after closing expenses) to the trustee pursuant to Probate Code § 2631(c). At that point, the trustee can sign a "Receipt" for said assets for filing with the Court (see Probate Code § 11751).

Probate Status Hearing RE: Filing of the First Account

DOD: 04/12/13	<p>JEOFFERY SPEER, son, was appointed Administrator of the Estate without bond and with full IAEA on 11/18/13. Letters of Administration were issued on 11/20/13.</p> <p>On 10/07/14, at a status hearing regarding filing of the Inventory & Appraisal, the Court removed Jeoffery Speer as Administrator and, on its own motion, appointed the Public Administrator.</p> <p>Note: On 2-3-15, Jeoffery Speer, former Administrator, filed an Inventory and Appraisal; however, the document is incomplete.</p> <p>Minute Order from hearing on 02/09/15 set this matter for status regarding filing of the Account/Petition for Distribution.</p> <p>Status Report Regarding Final Distribution filed 10/13/15 states: The Public Administrator's office recently underwent a staff change and has been unable to review and become familiar with every case. An Inventory & Appraisal was filed 02/03/15, but there are questions regarding the possibility of the existence of other items of property. Therefore the Public Administrator does not feel that the estate is ready to be closed and requests that the next status hearing be set no sooner than 90 days from the date of this hearing to allow time to review the file and ascertain what remains to be done in order to bring the estate to a close.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Letters of Administration have not been issued to the Public Administrator.</p> <p>1. Need Accounting/Petition for Final Distribution and/or current verified 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		
	<p>Reviewed by: JF</p> <p>Reviewed on: 10/13/15</p> <p>Updates: 10/15/15</p> <p>Recommendation:</p> <p>File 7 – Speer</p>	

Age: 62	TOM AVEDESIAN and LOUISE AVEDESIAN , Co-Trustees, are petitioners.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 09/21/2015 (Judge Petrucelli): Neither Trustee is present due to illness and the raisin crop; matter is continued an at least one of the Co-Trustees is ordered to be personally present in Court on 10/19/2015.</p> <p>Minute Order of 08/24/2015: The Court wants at least one of the Co-Trustees present in Court on 09/21/2015 in order to speak with them directly regarding the expenditures. The following issues remain:</p> <ol style="list-style-type: none"> 1. Disbursements include rent fees in the amount of \$4,456.00. Examples of Trust Distributions that will reduce SSI benefits are housing costs. Housing costs are not a permissible distribution from the Special Needs Trust if they reduce other benefits that the beneficiary could be entitled to. Need to provide justification of paying rent from the Special Needs Trust. – Declaration of Attorney Johnson filed 8/21/15 states in regards to paying of rent, the Co-Trustees were trying to assist Mr. Kandarian in the least complicated way. They can certainly assist his needs in a different way other than housing costs in the future. 2. Disbursements include a charge in the amount of \$352.00 for “tires for truck” however the property on hand does not list a truck. Need clarification. – Declaration of Attorney Johnson filed on 8/21/15 states the beneficiary, Daniel Kandarian owns a pick-up truck and has a driver’s license. The tires on his truck needed to be replaced for safety reasons. Co-Trustees purchased the tires. <p style="text-align: center;">Please see additional page</p>
	Account period: 03/28/2014 – 4/15/2015	
Cont. from 072715, 082415, 092115	Accounting: \$50,365.25	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH: \$50,000.00	
<input checked="" type="checkbox"/> Verified	Ending POH: \$34,456.67	
<input type="checkbox"/> Inventory	Bond: \$52,514.00	
<input type="checkbox"/> PTC	Trustee - not addressed	
<input type="checkbox"/> Not.Cred.	Attorney - \$500.00	
<input checked="" type="checkbox"/> Notice of Hrg	Cost - \$200.00 (filing fee)	
<input checked="" type="checkbox"/> Aff.Mail w/	Petitioners pray for:	
<input type="checkbox"/> Aff.Pub.	1. The First Accounting of this special needs trust be approved.	
<input type="checkbox"/> Sp.Ntc.	2. Court approve court costs.	
<input type="checkbox"/> Pers.Serv.	3. For such other and further orders as the court may deem proper.	
<input type="checkbox"/> Conf. Screen	Notice of Non-Payment of Bond Premium filed 08/28/2015 states notice is hereby given that Suretic Insurance Company has not been paid the bond premium or premiums upon becoming due and payable nor upon demand. The aforementioned bond was posted at the request of and on behalf of the above named principal as required by the Probate Code of the State of California. As a result of non-payment of said premiums the undersigned objects to the final discharge of the above named being granted until such time as said premiums have been paid in full.	
<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 x		
<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: 10/14/2015	
	Updates:	
	Recommendation:	
	File 8 – Kandarian	

NEEDS/PROBLEMS/COMMENTS continued:

3. Need Order. – received; however does not comply with Local Rule 7.6.1C.
4. Notice of Non-Payment of Bond Premium was filed 08/28/2015. It appears the trustees are not paying the premium to the bonding company.

Note: If the petition is granted, status hearings will be set as follows:

- **Monday, September 25, 2017** at 9:00 a.m. in Department 303, for the filing of the second account.

9 Fran Mae Johns (Estate) Case No. 14CEPR00073

Executor Johns, Dennis H (Pro Per)

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

DOD: 01/14/2008	DENNIS H. JOHNS , son, was appointed Executor with limited IAEA authority without bond on 06/23/2014.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 08/28/2015: Mr. Johns represents that he did not know he had to prepare an accounting and has distributed much of the personal items. He is admonished that he should not be acting without the Court's approval. The Court revokes Mr. John's full authority forthwith and grants limited authority only. He is further admonished that he is to do nothing with the real property that is still in existence without a court order, and is ordered to file a petition within 60 days. Mr. Johns states that he recognizes that he needs to seek counsel, and is directed to not pay any attorney fees without a court order. No appearance is necessary on 10/19/2015 if a petition is filed at least two Court days prior. If a petition is not filed, Mr. Johns is admonished that he could be removed as Executor, and that he must then be present in court or appear by Court Call on 10/19/2015.</p> <p>1. Need First Account or Petition for Final Distribution.</p>
	Letters issued on 06/23/2014.	
Cont. from 082815	Final Inventory & Appraisal filed 11/04/2014 shows an estate valued at \$260,000.00.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.	Minute Order of 06/23/2014 set this status hearing for the filing of the First Account and/or Petition for Distribution.	
Notice of Hrg		
Aff.Mail	Status Report of Melvin K. Rube filed 10/15/2015 states he has been retained by the executor, Dennis Johns, who resides in Sterling, Alaska, to prepare and file on his behalf, a first and final report and accounting and petition for final distribution. Attorney Rube has reviewed the file provided by the Executor and has determined that before a first and final accounting can be filed, a supplemental Inventory and Appraisal needs to be filed.	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Mr. Rube states he is having knee replacement surgery on 10/22/2015 and will be out of his office for at least two weeks. Therefore, Mr. Rube requests a 90 day continuance of this matter so that a Supplemental Inventory and Appraisal can be filed and a first and final report and account and petition for distribution prepared and filed with the Court.	
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
Reviewed by: LV		
Reviewed on: 10/14/2015		
Updates:		
Recommendation:		
File 9 - Johns		

10 William Leon Kermoyan (Estate) Case No. 14CEPR00227

Attorney Coleman, William H (for Leo Kermoyan – Administrator)

Probate Status Hearing Re: Filing of the First Account

DOD: 11-24-11	LEO KERMOYAN , Son, was appointed Administrator with Will Annexed with full IAEA authority and bond set at \$479,000.00.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR.</u> <u>First and Final Account filed 09/18/2015.</u> <u>Hearing is set for 11/03/2015.</u></p>	
	Final Inventory and Appraisal filed 08/27/2014 shows an estate of \$450,000.00.		
Cont. from 082115, 091415	Minute Order of 04/22/2014 set this status hearing for the filing of the First account.		
Aff.Sub.Wit.	<p>Former Status Report filed 08/19/2015 states a Final Inventory and Appraisal of the estate was filed on 08/27/2014, showing assets having a total appraised value of \$450,000. Petitioner alleges that such inventory totaling \$450,000 contains all the assets of the estate that have come to petitioner's knowledge or into his possession. The sole asset of the estate was an 8-unit apartment complex located at 3402 E. Clinton Ave. which was owned by decedent at the time of death as his separate property. Decedent's spouse, Rose Kermoyan, managed the property and collected the rents until her death in February of 2014. The Administrator listed the property and gave notice of proposed action to all the beneficiaries under the will of the decedent. The apartment complex was sold June 24, 2015, and resulted in the following: The real property was valued at \$450,000 and sold for 90% of its value, at \$405,000. It had no encumbrances or mortgages on the property. The net proceeds on the sale of eight units was \$371,986.37, after Broker's commission, maintenance fees and credit to buyer for repairs, and escrow fees were paid.</p> <p>Administrator is working with this attorney to draft an accounting of rents and list expenses paid since his appointment as personal representative. It is estimated that the time it will take to prepare and to file the Petition with the accounting will be four weeks.</p>		
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>Reviewed by: LV</p> <p>Reviewed on: 10/14/2015</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 10 – Kermoyan</p>

Attorney

Setrakian, Philip S. (for Connie Hamlin – Administrator – Petitioner)

First Amended First and Final Account and report of Administrator and petition for Settlement Thereof; for Allowance of Statutory Attorney Fees and Administrator Compensation and for Final Distribution

DOD: 4/1/14		<p>CONNIE HAMLIN, Daughter and Administrator with Full IAEA without bond, is Petitioner.</p> <p>Account period: 4/1/14 – 6/1/15 Accounting: \$488,472.32 Beginning POH: \$478,437.52 Ending POH: \$233,843.77 (Cash)</p> <p>Administrator (Statutory): \$12,438.73 Attorney (Statutory): \$12,438.73 Closing: \$4,966.31</p> <p>Distribution pursuant to intestate succession:</p> <p>Steven Ash: \$51,000.00 Connie Hamlin: \$51,000.00 Randy Ash: \$51,000.00 Timothy Ash: \$51,000.00</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 9/14/15</u>: Counsel has a proposed order to submit after court today that he feels addresses the defects.</p> <p>Note: Declaration of Administrator was filed 9/21/15. The following issue remains noted:</p> <p>1. Preliminary distributions totaling \$183,204.60 were made without prior Court authorization in violation of Probate Code §11620 et seq.</p> <p>Although the Declaration filed 9/21/15 states notice was given and funds used to pay these preliminary distributions were less than one-half of the total net value of the estate pursuant to §113623(2), the Court may require clarification with reference to the request that all acts and proceedings of the Administrator be confirmed, ratified, and approved.</p>	
Cont. from 091415				
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
✓	PTC			
✓	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
✓	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
✓	FTB Notice			
		Reviewed by: skc		
		Reviewed on: 10/13/15		
		Updates:		
		Recommendation:		
		File 11 – Ash		

12 Ryan James Hall & Randii Jaiden Hall (GUARD/P) Case No. 14CEPR00819

Petitioner Hall, Aaron J. (Pro Per – Father – Petitioner)

Guardian Carr, Theresa D. (Pro Per – Paternal Grandmother – Guardian)

Petition for Termination of Guardianship

See petition for details.			NEEDS/PROBLEMS/ COMMENTS: 1. The mother, Amanda Haven, was personally served on 10/15/15, which is only four days prior to the hearing. Probate Code §1460(b)(5) requires 15 days' notice. 2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing per Probate Code §1460(b)(5) on <u>all relatives</u> : - Randy Hall (Paternal Grandfather) - David Owen (Maternal Grandfather) - Mary Owen (Maternal Grandmother)
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W	
	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: 10/13/15
			Updates: 10/16/15
			Recommendation:
			File 12 – Hall

Petitioner Estrada, Richard Lucio (Pro Per – Maternal Grandfather – Petitioner)

Petitioner Estrada, Jacqueline (Pro Per – Maternal Grandmother – Petitioner)

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

See petition for details.			<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p><u>Minute Order 9/1/15 (Temp):</u> The Court dispenses with notice to the father unless and until his whereabouts become known. The Court orders that the father not be allowed to have any visits. Mother is authorized to have supervised visits only, and no overnights. Additionally, mother is not to be left alone with the child in any way.</p>
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 10/13/15
			Updates:
			Recommendation:
			File 13 – Leos

Petitioner Alvarez, Chantelle (Pro Per – Aunt – Petitioner)
 Petition for Termination of Guardianship

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Page A - Petition for Termination of Guardianship with Tennison Finney, Step-Mother.</p> <p>Page B - Petition for Guardianship with Chantell Alvarez, Paternal Aunt.</p> <p>Minute Order 8/27/15 (Temp): Petitioner represents that the minors have been residing with her since June, despite what Tennison Finney, aka Tennison Stone, previously reported to the Court. The Court orders that the Orders/Letters appointing Tennison Finney are suspended forthwith and appoints Chantelle Alvarez as Temporary Guardian of the minors.</p> <p>Minute Order 9/9/15 (OSC): Ms. Stone reports that the minors are with Chantelle Alvarez, but were still in Ms. Stone's care until June when they went to stay with Ms. Alvarez for the summer. She did not obtain counseling for Breanna as ordered because the minor was not with her. The Court vacates the OSC and orders that Ms. Stone need not appear at the general hearing on 10/19/15.</p>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report	X		
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 10/13/15	
			Updates:	
			Recommendation:	
			File 14A - Finney	

Petitioner Alvarez, Chantelle (Pro Per – Aunt – Petitioner)

Petition for Appointment of Guardian of the Person

		See petition for details.	NEEDS/PROBLEMS/ COMMENTS: <u>Note: Continuance is required for Court Investigation.</u>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			W
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report	X		
	Clearances	X		
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 10/13/15	
			Updates:	
			Recommendation:	
			File 14B - Finney	

Petitioner Andres Alfonso Cobarubias (Pro Per – Brother – Petitioner)

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

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 9/28/15:</u> Petitioner represents that the paternal grandfather is Alberto Reyes and the paternal grandmother is deceased. Continued for proper notice to the paternal grandfather.</p> <p>1. Notice of Hearing filed 9/30/15 indicates mailed service to “Alberto Pacheco, grandfather on dad’s side” and “Rosa Pacheco, grandmother on dad’s side.”</p> <p>These names are inconsistent with the information provided at the hearing. Is the paternal grandfather Alberto Reyes or Alberto Pacheco? Is the paternal grandmother deceased, or is Rosa Pacheco the paternal grandmother?</p>	
Cont. from 061515, 072015, 083115, 092815				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			w/
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	Clearances			
<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: skc</p>				
<p>Reviewed on: 10/13/15</p>				
<p>Updates:</p>				
<p>Recommendation:</p>				
<p>File 15 - Reyes</p>				

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

		<p>See petition for details.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 8/31/15:</u> Ms. Perez is sworn and interprets for the petitioner. The petitioner is directed to bring Aurora Heredia to the next hearing.</p> <p><u>Minute Order 7/20/15:</u> Maria Vargas and Ruby Martinez are to file written objections by 8/3/15 or the Court will not consider them.</p> <p>As of 10/13/15, no objections have been filed.</p> <p>The following issue remains noted:</p> <ol style="list-style-type: none"> 1. Notices of Hearing served on paternal grandmother Felipa Arredondo and maternal grandmother Ruby Martinez on 9/30/15 are still defective. Notice of Hearing appears to have served along with the Temp Order (GC-140) and Duties (GC-248) only, but not a copy of the petition per §1511. 	
Cont. from 061515, 072015, 083115				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			W
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	Clearances			
<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: skc		
		Reviewed on: 10/13/15		
		Updates:		
		Recommendation:		
		File 16 - Saavedra		

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

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 8/31/15:</u> Petitioner advises the Court that she has had some deaths in the family and would like to request continuance.</p> <p>As of 10/13/15, nothing further has bene filed. The following issues remain:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service of Notice of Hearing with a copy of the petition per Probate Code §1511 at least 15 days prior to the hearing or consent and waiver of notice on: <ul style="list-style-type: none"> - Thurman Ligons (Father) - Laquandra Kinchen Ligons (Mother) 3. Need proof of service of Notice of Hearing with a copy of the petition per Probate Code §1511 at least 15 days prior to the hearing or consent and waiver of notice or declaration of due diligence on: <ul style="list-style-type: none"> - Paternal Grandmother - Maternal Grandfather Nick Kinchen - Maternal Grandmother Cassandra Miles - Siblings age 12 or older 	
Cont. from 061515, 072715, 083115				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			X
<input type="checkbox"/>	Aff.Mail			X
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			X
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	DSS Report			X
<input type="checkbox"/>	Clearances			X
<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: skc				
Reviewed on: 10/13/15				
Updates:				
Recommendation:				
File 17 - Ligons				

Petitioner Villalvazo, Roseana (Pro Per – Maternal Great Aunt)

Petition for Appointment of Guardianship of the Person

Age: 13		<p style="text-align: center;"><u>TEMPORARY EXPIRES 09/21/2015</u></p> <p>ROSEANA VILLALVAZO, maternal great aunt, is petitioner.</p> <p style="text-align: center;"><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 09/21/2015 (Judge Petrucelli): Petitioner not present due to illness. The Court finds due diligence as to Justin Lyman, father.</p> <p>1. UCCJEA is incomplete. Need minor's residence information for the past 5 years.</p>	
Cont. from 062915, 080315, 092115				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			w/
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input 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: 10/14/2015</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 18A - Pascale</p>				

Attorney
Attorney

Schorling, Douglas D. (for Kevin S. Campbell – Beneficiary – Petitioner)
Roberts, Gregory J. (for Billie J. Campbell – Trustee – Respondent)

Petition to Compel Trustee to Account

<p>Jerry W. Campbell DOD: 8/4/00</p>	<p>KEVIN S. CAMPBELL, Beneficiary, is Petitioner.</p>	<p>NEEDS/PROBLEMS/ COMMENTS:</p>
	<p>Petitioner he is a beneficiary of The Restated Campbell Family Trust (The Trust) executed by JERRY W. CAMPBELL and BILLIE J. CAMPBELL on 3/16/95. The trust provides that upon the death of the first Trustor, the trust estate is to be divided into three trusts: Trust A, the Jerry W. Campbell Family Trust; Trust B, the Billie J. Campbell Family Trust; and Trust C, the Campbell QTIP Trust</p>	<p>Minute Order 8/17/15: Mr. Schorling reports to the Court that he spoke with Mr. Roberts by phone this morning, who indicated that he inadvertently failed to calendar this morning's hearing, but that he has information to provide to Mr. Schorling. Mr. Roberts is ordered to be personally present in Court on 10/19/15.</p>
<p>Cont from: 062215, 070615, 081715</p>	<p>The Trust appoints BILLIE J. CAMPBELL as trustee of all three trust, and appoints the trustors' two sons, RANDALL D. CAMPBELL (DOD 1/4/07) and RICKY D. CAMPBELL (DOD 4/20/09), and DAVID ASH as successor co trustees. As a result of the deaths of Randall D. Campbell and Ricky D. Campbell, David Ash is the sole successor trustee.</p>	<p>As of 10/13/15, nothing further has been filed.</p>
<p><input type="checkbox"/> Aff.Sub.Wit.</p>	<p>It is unclear to Petitioner whether Billie J. Campbell is still the trustee of the trusts. It is possible that she has resigned or has appointed David Ash as a co-trustee.</p>	<p>Note: Declaration of Douglas D. Schorling in Response to Response to Petition was filed 6/29/15. See additional pages.</p>
<p><input checked="" type="checkbox"/> Verified</p>	<p>The trustors are also the trustors of The Jerry W. Campbell and Billie J. Campbell Irrevocable Trust dated 3/28/91. DAVID ASH is the trustee of the Irrevocable Trust.</p>	<p>1. Petitioner provides names and addresses of the "other beneficiaries;" however, Probate Code §17201 requires the petition to list of each person <u>entitled to notice</u>. Need complete list of each person entitled to notice in this proceeding, including Petitioner's own information.</p>
<p><input type="checkbox"/> Inventory</p>	<p>Petitioner believes it is possible that Billie J. Campbell and David Ash have commingled assets between the Trust and the Irrevocable Trust.</p>	<p>2. Notice of Hearing filed <u>6/3/15</u> indicates service mailed on <u>July 29, 2015</u>. Need amended Notice of Hearing reflecting the correct service date.</p>
<p><input type="checkbox"/> PTC</p>	<p>Paragraph 2.1 of Section V of the Trust specifically requires the trustee to account. Neither Billie J. Campbell nor David Ash has made any report of information about the Trust nor any account of the Trust.</p>	<p>Reviewed by: skc</p>
<p><input type="checkbox"/> Not.Cred.</p>	<p>On 8/28/14, Petitioner mailed by certified mail a written demand for documentation including annual accountings, information under Probate Code §16060, 16061, 16060.7.</p>	<p>Reviewed on: 10/13/15</p>
<p><input checked="" type="checkbox"/> Notice of Hrg</p>	<p>SEE ADDITIONAL PAGES</p>	<p>Updates:</p>
<p><input checked="" type="checkbox"/> Aff.Mail W</p>		<p>Recommendation:</p>
<p><input type="checkbox"/> Aff.Pub.</p>		<p>File 19 - Campbell</p>
<p><input type="checkbox"/> Sp.Ntc.</p>		
<p><input type="checkbox"/> Pers.Serv.</p>		
<p><input type="checkbox"/> Conf. Screen</p>		
<p><input type="checkbox"/> Letters</p>		
<p><input type="checkbox"/> Duties/Supp</p>		
<p><input checked="" type="checkbox"/> Objections</p>		
<p><input type="checkbox"/> Video Receipt</p>		
<p><input type="checkbox"/> CI Report</p>		
<p><input type="checkbox"/> 9202</p>		
<p><input checked="" type="checkbox"/> Order</p>		
<p><input type="checkbox"/> Aff. Posting</p>		
<p><input type="checkbox"/> Status Rpt</p>		
<p><input type="checkbox"/> UCCJEA</p>		
<p><input type="checkbox"/> Citation</p>		
<p><input type="checkbox"/> FTB Notice</p>		

Page 2

Petitioner states the trustee has failed and refused to prepare and provide Petitioner with the requested account and has failed and refused to Provide Petitioner with any of the requested information and documentation. In addition, the Trustee never provided Petitioner with the required notice under §16061.7 upon the death of Jerry W. Campbell.

Attached to the petition are the Exhibit A – Restated Campbell Family Trust dated 3/16/95, Petitioner's Letter dated 8/28/14, and the certified mail return receipt for the Letter.

Petitioner prays for an order:

1. Compelling Billie J. Campbell and/or David Ash to prepare and file with this Court an account of the Trust since its commencement on 3/28/91, including copies of any and all documents that support, substantiate, or evidence any item set forth in the accounting. See petition for specifics re requested documentation;
2. Instructing Billie J. Campbell and/or David Ash to petition this Court for the settlement of the account and give notice of hearing on the petition;
3. Compelling Billie J. Campbell and/or David Ash to provide Petitioner with all information necessary under §06060 to keep the beneficiaries reasonably informed of the trust and its administration;
4. Compelling Billie J. Campbell and/or David Ash to provide Petitioner with information under §16061 to report to the beneficiary by providing the requested information relating to the administration of the trust relevant to the beneficiary's interest;
5. Compelling Billie J. Campbell and/or David Ash to provide Petitioner with the terms of the Trust, as required by §16060.7;
6. For such attorney fees and costs as may be allowable by law; and
7. For all other orders the court deems proper.

Response filed 6/8/15 by BILLIE J. CAMPBELL states:

- Respondent is the sole beneficiary and currently acting sole trustee of Trust B with power to amend and/or revoke Trust B, and as trustee, no duty to account to any other person of the financial transactions of Trust. B.
- No Trust C (QTIP Trust) was established pursuant to the death of Jerry W. Campbell as the trust had insufficient assets to require such establishment.
- Trust A was not subdivided into "Exempt Family Trust A" and "Non-Exempt Family Trust A" because there were no generation-skipping issues which would require such subdivision. Respondent is the lifetime sole beneficiary of Trust A and unless as trustee she determines to make discretionary distributions to others, the lifetime sole principal beneficiary of Trust A, the intention of Jerry W. Campbell being to provide first for the needs of his surviving spouse (see Trust). There is no distribution of Trust A assets required to be made to any beneficiary other than Respondent until Trust A is divided into separate shares upon her death.

SEE ADDITIONAL PAGES

Page 3

Respondent states the duty of the trustee to account is to the beneficiaries of "their trust." Until the death of Respondent, no trusts are established for any beneficiaries other than Respondent. Consequently, Trustee currently has no duty to account to anyone other than Respondent of the transactions of any trust established under the Restated Campbell Family Trust.

To Respondent's belief, the administration of the Irrevocable Trust, of which Respondent was not a trustee, has been concluded.

Respondent has had to retain counsel to file this response and asks the Court to order Petitioner to reimburse the costs and fees incurred, as proven upon subsequent declaration of Gregory J. Roberts.

Respondent prays for an order:

1. That Respondent is the sole beneficiary of Trust B entitled to an accounting;
2. That Respondent was never a trustee of the Irrevocable Trust and has no obligation to account or participate in any accounting;
3. That Petitioner shall reimburse Respondent for the costs and attorney's fees she has incurred; and for
4. Such other and further relief as the Court deems proper.

Examiner's Note: The Irrevocable Trust is not before the Court at this time; therefore, the Court cannot make orders regarding Respondent's obligations in connection with the Irrevocable Trust.

Declaration of Douglas D. Schorling in Response to Response to Petition to Compel Trustee to Account filed 6/29/15 states under Probate Code §24, a "beneficiary" as it relates to a trust means a person who has any present or future interest, vested or contingent. Petitioner is clearly a beneficiary and is entitled to all of the rights granted to a beneficiary under the Probate Code. In her response, the trustee admits that Trust A is irrevocable, but take the position that the trustee has no duty to account because she is still alive. Not only is the trustee's position contrary to California law, it also ignores the fact that Petitioner has requested more than an accounting. Petitioner has requested the information to which he is entitled pursuant to §16060, 16060.7, 16061, and 16061.5. The trustee has also failed to provide notification as required by §16061.7 and is therefore liable under §16061.7 for all damages, attorney's fees, and costs caused by that failure. See declaration for authority. Declaration states Petitioner is entitled to the relief requested in the petition.

Petitioner is also sensitive to the fact that the trustee, who is his grandmother, apparently feels burdened by Petitioner's requests. Consequently, Attorney Schorling has advised counsel for the trustee that Petitioner is willing to forego an official accounting if the trustee is willing to provide the other information and documentation requested. To the extent any of the requested information is also available to third parties, such as financial institutions, the trustee is free to have the information provided directly to petitioner by such third parties rather than providing herself.

20 Skarlett Lopez, Natalia Lopez (GUARD/P) Case No. 15CEPR00526

Petitioner: Ana Torres (paternal grandmother - pro per)

Petitioner: Emily Alvarez (maternal great-grandmother - pro per)

Petition to Appoint Guardian of the Person

	THERE IS NO TEMPORARY. No temporary was requested.		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 8/31/15. Minute order states the examiner notes were handed in open court. As of 10/14/15 the following issues remain:</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. Ramon Torres (father) b. Victoria Morales (mother) 3. Need proof of service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. Sabino Lopez (paternal grandfather) b. Unknown maternal grandfather c. Natalie Alvarez (maternal grandmother)
	EMILY ALVAREZ , maternal great grandmother, and ANA TORRES , paternal grandmother, are petitioners.		
	Please see petition for details.		
	Court Investigator Report filed on 7/13/15		
	Conf. from 072015, 083115		
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: KT
			Reviewed on: 10/14/15
			Updates:
			Recommendation:
			File 20 – Lopez

Petitioner Charleena T. Mack (Pro Per Petitioner)

Petition for Appointment of Guardian of the Person

		NO TEMPORARY REQUESTED	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 8/31/2015.</u> <i>Minute Order</i> states in pertinent part that the Court notes that Charles Mack is deceased and is the Petitioner's father. The Petitioner is provided a copy of the examiner notes and is directed to cure the defects. (Note: All defects appear to have been cured.)</p>
		<p>CHARLEENA T. MACK, maternal aunt, is Petitioner.</p> <p>~Please see <i>Petition for details</i>~</p> <p>Court Investigator's Report was filed on 8/18/2015.</p>	
Cont. from 083115			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 10/13/15
			Updates:
			Recommendation:
			File 22 – Hadley

Petition for Appointment of Guardian of the Person (Prob. Code §1511)

		See petition for details.	NEEDS/PROBLEMS/ COMMENTS:	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 10/13/15	
			Updates:	
			Recommendation:	
			File 23 – Huaracha	

24 Shaiane Williams-Alvarado and Joseph Williams, Jr. (GUARD/P)
Case No. 15CEPR00801

Petitioner Jonathan Grimes (Pro Per, maternal grandfather)
 Petitioner Paquita Yolanda Grimes (Pro Per, maternal grandmother)

Petition for Appointment of Guardian of the Person

		NO TEMPORARY REQUESTED	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need proof of service by mail of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian</i>, or <i>Consent to Appointment of Guardian and Waiver of Notice</i>, or a <i>Declaration of Due Diligence</i>, for: <ul style="list-style-type: none"> • Jasmine Alvarado, sibling (age 15); • Paternal grandparents. 2. UCCJEA form filed on 8/18/2015 does not provide residence information for the last 5 years as required.
		<p>JONATHAN D. GRIMES and PAQUITA YOLANDA GRIMES, maternal grandparents, are Petitioners.</p> <p style="text-align: center;"><i>~Please see Petition for details~</i></p> <p>Court Investigator's Report filed 10/13/2015.</p>	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	X	
<input type="checkbox"/>	Aff.Mail	X	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	X	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	Clearances		
<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: LEG	
		Reviewed on: 10/13/15	
		Updates: 10/14/15; 10/15/15	
		Recommendation:	
		File 24 – Williams-Alvarado	

Petitioner Rosa Hernandez (Pro Per)

Spousal or Domestic Partner Property Petition

DOD: 6/3/2015		<p>ROSA HERNANDEZ, surviving spouse, is Petitioner.</p> <p>No other proceedings.</p> <p>Decedent died intestate.</p> <p>Petitioner states she married Decedent on 4/7/1977 in Mexicalli, Mexico, and upon coming to the United States, she and Decedent married again, on 7/24/1978, in Los Angeles, California (<i>marriage certificates attached as Exhibits 1 and 2.</i>) [Please see additional page for summary of Petitioner's Declaration.]</p> <p>Petitioner requests:</p> <ol style="list-style-type: none"> 1. Court determination that real property located on McKenzie Ave. in Fresno; and real property on Las Cruces Court in Salinas; and real property on Home Ave. in Fresno; and vehicles, tools, jewelry, bank accounts, and Social Security pension, all listed in Attachment 7(a), passes to her; and 2. Court confirmation that <u>[no property is listed in an Attachment 7(b)]</u> belongs to her. <p>~Please see additional page~</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Petition contains defects which include, but are not limited to, the following:</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i> and proof of service by mail of the <i>Notice of Hearing</i> pursuant to Probate Code § 13655(a)(2) for all persons listed in Item 9 of <i>Petition</i>. 2. Item 5(a)(1) of the <i>Petition</i> is incomplete re: natural or adopted surviving child. 3. Item 5(a)(2) of the <i>Petition</i> is incomplete re: issue of a predeceased child. 4. Item 5(b) of the <i>Petition</i> is incomplete re: survived by a stepchild or foster child. 5. Attachment 7(a) to the <i>Petition</i> does not contain the legal descriptions of each of the subject real properties, including the APN (Assessor's Parcel Number) which Petitioner requests to be determined as having passed to her as surviving spouse. 6. Need Attachment 7(b) to the <i>Petition</i> containing the legal descriptions of each of the subject real properties, including the APN (Assessor's Parcel Number), and all the personal property, which Petitioner requests to be determined as having belong to her as surviving spouse. <p>~Please see additional page~</p>
Cont. from			
Aff.Sub.Wit.			
Verified	X		
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	X		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: LEG</p> <p>Reviewed on: 10/14/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 25 – Negrete</p>	

Petitioner's Declaration attached to the Petition states:

- She and Decedent had 5 children and never divorced and there never was a custody or child support order;
- Decedent purchased the properties listed in this *Petition* in his name; he was a controlling man; they separated but remained friends; he lived in Fresno and she lives in Las Vegas, Nevada;
- When Decedent found out he was dying of pancreatic cancer in May of 2015, she would visit with him, while he lived with his girlfriend, **KIM HARRIS**;
- Decedent spoke of a will but was too sick to write one; he was in a lot of pain and could not walk nor knew where he was due to pain and medication; he was in and out of the hospital; she and their son, **ALVARO NEGRETE**, took care of Decedent; he was sent home from the hospital on 6/2/2015 and died on 6/3/2015;
- They have a daughter, **MARIA NEGRETE**, who produced a Trust stating that Decedent had left her in charge of everything; the handwriting on the Trust is not Decedent's signature; he was to have signed this document on 6/1/2015; he was in no condition to sign nor speak;
- When Decedent died, Maria told the doctors that Decedent was divorced; since Decedent's death, Maria has taken over **\$18,000.00** out of Decedent's bank account, and the bank put a freeze on the account after Petitioner produced documents proving to be the surviving spouse;
- There is real property and personal property to be administered; it has taken her this long to petition the Court due to her having to take care of their son who is recovering from second and third degree burns from a work-related injury;
- Maria has taken vehicles and put them in her name and took them to Arizona;
- Decedent's girlfriend, **KIM HARRIS**, also took vehicles; all the vehicles belong to Decedent;
- Maria is trying to clear out Decedent's account and put her brothers out of the property belonging to Decedent;
- She prays for a court date to resolve this matter of the fraudulent Trust and prove that she is indeed the surviving spouse of the Decedent.

NEEDS/PROBLEMS/COMMENTS, continued:

7. Item 8 of the *Petition* is incomplete re: written agreement.
8. Item 10 of the *Petition* states there exists no genuine will or trust, and that [*Decedent*] was too ill to sign the trust. However, *Exhibit 4* to the *Petition* contains a copy of an apparently executed and notarized document entitled the **JUAN RIOS NEGRETE REVOCABLE LIVING TRUST**. Petitioner cannot seek to have the Trust determined as fraudulent via the instant spousal property petition.
9. Item 12 of the *Petition* states a petition for probate or for administration of Decedent's estate is being filed with this *Petition*. Court records do not show such proceeding has been filed or is pending.
10. *Petition* includes Attachment 1, 2, and 3, containing copies of Deeds, two of which do not include the identified exhibits which describe the real properties, and one of which appears to transfer the identified real property to **ALVARO NEGRETE, JUAN NEGRETE, and KIM HARRIS**, as joint tenants. Said Attachments are ineffective for any purpose related to the instant spousal property petition.
11. *Petition* is signed but is not dated nor verified by the Petitioner pursuant to Probate Code § 1021 and CA Rule of Court 7.103. [*Note: Declaration attached to the Petition is notarized and verified.*]

Petitioner Anita L. Carter (Pro Per)

Petition for Appointment of Temporary Guardian of the Person

		<u>General Hearing set for 12/14/2015</u>	NEEDS/PROBLEMS/COMMENTS:
		ANITA L. CARTER, maternal aunt, is Petitioner.	
		~Please see Petition for details~	<p>1. Need <i>Notice of Hearing</i> and proof of five (5) court days' notice by personal service of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian, or Consent to Appointment of Guardian and Waiver of Notice, or a Declaration of Due Diligence</i> for:</p> <ul style="list-style-type: none"> Craig Simpson, father, if Court does not excuse notice as Petitioner requests. <p>2. Item 19 of the <i>Confidential Guardian Screening</i> form filed on 10/2/2015 is incomplete. (This defect should be cured prior to the general hearing on 12/14/2015.)</p>
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 10/14/15
			Updates:
			Recommendation:
			File 26 – Simpson

Petition for Appointment of Temporary Guardian of the Person

		<u>GENERAL HEARING 12/16/15</u>	NEEDS/PROBLEMS/COMMENTS: Based on the statements from the petitioner that the children are in foster care in Kings County, it appears that Kings County Juvenile Court has jurisdiction of this matter. 1. Need Notice of Hearing. 2. Need proof of service of the Notice of Hearing along with a copy of the temporary petition or Consent and Waiver of Notice or Declaration of Due Diligence on: a. Jimmy Dave Serna, Sr. (father) b. Shalone Quinetta Broadus (mother) Note: A Declaration of Due Diligence was filed for the father, Jimmy Serna. The declaration states the father has written petitioner from prison. Therefore it appears his whereabouts are not unknown and he should be noticed of the hearing. 3. Confidential Guardian Screening form is incomplete at question 2, has petitioner been charged with, arrested for, or convicted of a crime deemed to be a felony or misdemeanor? And question 5, is petitioner receiving services from a psychiatrist, psychologist, or therapist for a mental health related issue? Questions 10, 11 and 12 have yes answers without explaining as required.
YAVONNE TURNSTALL, maternal grandmother, is petitioner. Please see petition for details.			
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		
<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: KT
			Reviewed on: 10/14/15
			Updates:
			Recommendation:
			File 27 – Broadus/Serna