



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Petition for Appointment of Temporary Conservator of the Person

| | | | |
|--|--|---|---|
| Age: 99 years DOB: 07/13/1917 | <p align="center"><u>GENERAL HEARING 12/5/2016</u></p> <p>EMILY J. ABELL, granddaughter, is petitioner and requests appointment as conservator of the person. She further requests to change the residence of the conservatee.</p> <p>Public Guardian is currently conservator of the estate since March 2011.</p> <p><i>Please see petition for details.</i></p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator advised rights 10/21/2016</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of personal service at least five days before the hearing of the Notice of Hearing with a copy of the petition on: <ol style="list-style-type: none"> a. Anita Mosesian (proposed conservatee) 3. Need proof of mailed service at least five days before the hearing of the Notice of Hearing with a copy of the petition on: <ol style="list-style-type: none"> a. Eddie Mosesian (son) b. Elaine Mosesian (granddaughter) c. Matthew Mosesian (grandson) d. Angela Mosesian (granddaughter) e. Public Guardian (conservator of the estate) 4. Need <i>Letters</i>. | |
| 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 type="checkbox"/> Letters | | | x |
| <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 | | | |
| <p>Reviewed by: SEF</p> | | | |
| <p>Reviewed on: 10/24/2016</p> | | | |
| <p>Updates: 10/25/2016</p> | | | |
| <p>Recommendation:</p> | | | |
| <p>File 2- Mosesian</p> | | | |

Fourth and Final Account and Report of Conservator; Petition for Allowance of Compensation to Conservator and Attorney; and Distribution

| | | | |
|-------------------------------------|--|--|---|
| DOD: 7/31/16 | FRESNO COUNTY PUBLIC GUARIAN is Conservator/Petitioner. | NEEDS/PROBLEMS/COMMENTS: Note: The petition of Alice Bethel for appointment as Administrator of the Estate of Clifford M. Bethel, Jr., in 16CEPR00957 was continued from 10/20/16 to 11/3/16. | |
| | | | |
| | | | |
| | | | |
| | Account period: 7/1/14 – 7/31/16 | | |
| | Accounting: \$191,038.29 | | |
| | Beginning POH: \$90,973.76 | | |
| | Ending POH: \$179,768.84 | | |
| | (\$48,350.97 cash plus investment account, various personal property) | | |
| <input type="checkbox"/> | Aff.Sub.Wit. | | |
| <input checked="" type="checkbox"/> | Verified | | |
| <input type="checkbox"/> | Inventory | | |
| <input type="checkbox"/> | PTC | | |
| <input type="checkbox"/> | Not.Cred. | | |
| <input checked="" type="checkbox"/> | Notice of Hrg | | |
| <input checked="" type="checkbox"/> | Aff.Mail | | W |
| <input type="checkbox"/> | Aff.Pub. | | |
| <input type="checkbox"/> | Sp.Ntc. | | |
| <input type="checkbox"/> | Pers.Serv. | | |
| <input type="checkbox"/> | Conf. Screen | | |
| <input type="checkbox"/> | Letters | | |
| <input type="checkbox"/> | Duties/Supp | | |
| <input type="checkbox"/> | Objections | | |
| <input type="checkbox"/> | Video Receipt | | |
| <input type="checkbox"/> | CI Report | | |
| <input type="checkbox"/> | 9202 | | |
| <input checked="" type="checkbox"/> | Order | | |
| <input type="checkbox"/> | Aff. Posting | | |
| <input type="checkbox"/> | Status Rpt | | |
| <input type="checkbox"/> | UCCJEA | | |
| <input type="checkbox"/> | Citation | | |
| <input type="checkbox"/> | FTB Notice | | |
| | Account period: 8/1/16 – 8/31/16 | | |
| | Accounting: \$197,518.96 | | |
| | Beginning POH: \$179,768.84 | | |
| | Ending POH: \$194,120.46 (cash) | | |
| | Conservator: \$1,739.68 (for 12.58 Deputy hours @ \$96/hr and 7 Staff hours @ \$76/hr, itemized at Exhibit C) | | |
| | Attorney: \$1,250.00 (less than local rule) | | |
| | Bond fee: \$970.62 | | |
| | Costs: \$435.00 | | |
| | Petitioner states the Conservatee died intestate. His sole heir, daughter Alice Bethel, has filed a petition for appointment as administrator of his estate. | | |
| | Petitioner prays for an order: | | |
| | 1. Approving, allowing and settling the account and report of conservator; | | |
| | 2. Authorizing the Conservator's and Attorney's compensation for their services; | | |
| | 3. Authorizing payment of the bond fee; | | |
| | 4. After payment of the fees and commissions and costs totaling \$4,395.30, distribution of the remaining estate in the amount of \$189,725.16 is to be made to Alice Bethel as Administrator of the Estate (16CEPR00957); and | | |
| | 5. Any other orders the Court considers proper. | | |
| | | Reviewed by: skc | |
| | | Reviewed on: 10/24/16 | |
| | | Updates: | |
| | | Recommendation: | |
| | | File 3- Bethel | |

Petition to Fix Residence Outside the State of California

| | | | |
|-------------------------------------|----------------------|---|---|
| | | <p>REVEÉ M. MARTIN, paternal grandmother, was appointed guardian of the person on 9/14/2011, and is petitioner.</p> <p><i>Please see petition for details.</i></p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. The <i>Notice of Hearing</i> filed 9/19/2016 is incomplete at #1 as to the title of the petition filed by petitioner. 2. Item 4b of petition is incomplete regarding the address of the court where the hearing is to take place. 3. Proof of mailed service of the <i>Notice of Hearing</i> filed 9/19/2016 on Bruce Smith does not clearly indicate if service was on Bruce Smith (dad) <u>or</u> Bruce Smith (paternal grandfather). Need clarification and may need further proof of service as to Bruce Smith (paternal grandfather). 4. Item 8 of petition lists both Donald Martin and Mattie Madden (deceased) as grandparents. These are not the names of the grandparents listed on the initial guardianship petition. Need clarification. <p><i>Please see additional page.</i></p> |
| Cont. from | | | |
| <input type="checkbox"/> | Aff.Sub.Wit. | | |
| <input checked="" type="checkbox"/> | Verified | | |
| <input type="checkbox"/> | Inventory | | |
| <input type="checkbox"/> | PTC | | |
| <input type="checkbox"/> | Not.Cred. | | |
| <input checked="" type="checkbox"/> | Notice of Hrg | | |
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| <input type="checkbox"/> | Status Rpt | | |
| <input type="checkbox"/> | UCCJEA | | |
| <input type="checkbox"/> | Citation | | |
| <input type="checkbox"/> | FTB Notice | | |
| | | Reviewed by: SEF | |
| | | Reviewed on: 10/24/2016 | |
| | | Updates: | |
| | | Recommendation: | |
| | | File 4- Smith | |

NEEDS/PROBLEMS/COMMENTS, *continued*:

Note: If the petition is granted:

1. Within **30 days** of the move to Nevada, Petitioner must file with the Court and serve on all interested parties a *Post-Move Notice of Change of Residence of Ward* (GC-080).
2. Petitioner must establish a guardianship or its equivalent in Arizona within **4 months** of the date of the Court's order fixing residence outside of California, pursuant to Probate Code §2352(c).
3. A status hearing will be set on **Tuesday, May 2, 2017 at 9:00 am in D303** for filing proof of the establishment of a guardianship in Nevada. Pursuant to Local Rule 7.5, upon filing with the Court satisfactory proof of establishment, the status hearing will come off calendar and no appearance will be required.

Petitioner Genia Kay Dewan (Pro Per, mother)

Attorney Jonette M. Montgomery, of Hanford (for Guardian Josephine M. Longoria-Contente)

Petition for Visitation

| | | | | |
|--|---------------|---|--|----|
| | | <p>GENIA KAY (CHERRY) DEWAN, mother, is Petitioner.</p> <p align="center">~Please Petition for details~</p> <p><i>Declaration of Josephine M. Longoria-Contente Regarding Opposition to Mother's Request for Visitation filed 9/6/2016.</i></p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Page 5B</u> is the <i>Petition for Termination of Guardianship</i> filed by Guardian JOSEPHINE M. LONGORIA-CONTENTE.</p> <p><u>Continued from 9/19/2016.</u> Minute Order states this matter is continued to meet up with the termination petition set for 11/1/2016.</p> <p><u>Note for background:</u> Minute Order dated 8/1/2016 from the previous hearing states Ms. Montgomery represents that her client is out of the country today but opposes the petition, and wants the guardianship terminated in order for the matter to be resolved in Family Court. The Court directs Counsel to properly file a Petition for Termination. Genia Dewan is advised to contact PD/CPS if she is concerned for the safety of the minors in their father's care.</p> | |
| Cont. from 080116, 091916 | | | | |
| | Aff.Sub.Wit. | | | |
| ✓ | Verified | | | |
| | Inventory | | | |
| | PTC | | | |
| | Not.Cred. | | | |
| ✓ | Notice of Hrg | | | |
| ✓ | Aff.Mail | | | W/ |
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| | Pers.Serv. | | | |
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| | 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: 10/25/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 5A – Bell</p> | | | | |

Petitioner Genia Kay Dewan (Pro Per, mother)

Attorney Jonette M. Montgomery, of Hanford (for Guardian Josephine M. Longoria-Contente)

Petition for Termination of Guardianship

| | | |
|---------------|--|--|
| | | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Notice of Withdrawal of Petition for Termination of Guardianship filed by Josephine M. Longoria-Contente was filed on 10/24/2016.</p> |
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| Cont. from | | |
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| Inventory | | |
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| Letters | | |
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| Video Receipt | | |
| CI Report | | |
| 9202 | | |
| Order | | |
| Aff. Posting | | |
| Status Rpt | | |
| UCCJEA | | |
| Citation | | |
| FTB Notice | | |
| | | Reviewed by: LEG |
| | | Reviewed on: 10/25/16 |
| | | Updates: |
| | | Recommendation: |
| | | File 5B- Bell |

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

| | | | |
|---|---|---|---|
| | <p>PUBLIC GUARDIAN Conservator of the Person and Estate, is Petitioner.</p> <p align="center">~Please see Petition for details~</p> <p>Court Investigator's Report was filed 6/8/2016.</p> | | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Petition for Attorney Fees filed 10/5/2016 by RYAN JANISSE is set for hearing on <u>11/15/2016</u>.</p> <p>Continued from 9/21/2016. Minute Order states counsel requests 30 days.</p> <p>The following issue from the last hearing remains:</p> <ol style="list-style-type: none"> Need proof of service by mail of the <i>Notice of Hearing</i> at least 15 days prior to the hearing pursuant to §§ 2621 and 1460 for the Conservatee, Rosie Reyna. <p>Note: If the <i>Petition</i> is granted, Court will set a status hearing as follows:</p> <ul style="list-style-type: none"> Thursday, August 30, 2018 at 9:00 a.m. in Dept. 303 for filing of the second account. <p>Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the date listed, the hearing will be taken off calendar and no appearance will be required.</p> |
| | <p>Cont. from 092116</p> | | |
| | 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 | | |
| | | | <p>Reviewed by: LEG</p> <p>Reviewed on: 10/25/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 6- Reyna</p> |

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

| | | |
|------------------------|--|--|
| DOD: 10/13/2014 | PATRICIA A. MELOM , niece, was appointed <i>Successor Administrator</i> with limited IAEA without bond on 9/29/2015. All funds in the Public Administrator's possession were to be placed in a blocked account at Chase Bank. | NEEDS/PROBLEMS/COMMENTS: 1. Need First or Final Account of Successor Administrator 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. |
| Cont. from | | |
| Aff.Sub.Wit. | Public Administrator voluntarily resigned 9/29/2015. | |
| Verified | <i>Letters</i> issued 10/9/2015. | |
| Inventory | Final I&A filed 6/25/2015 valued estate at \$625,338.93. | |
| PTC | Public Administrator's First and Final Account was approved 2/25/2016. | |
| Not.Cred. | Supplemental I&A was filed 9/29/2016 listing additional value to estate of \$923,128.34 (\$500,000.00 in blocked account at Chase Bank, plus additional cash, stocks and securities totaling \$423,128.34) | |
| Notice of Hrg | Minute order dated 9/29/2015 set this status hearing for filing of the First or Final Account by the Successor Administrator. | |
| Aff.Mail | | |
| Aff.Pub. | | |
| Sp.Ntc. | | |
| Pers.Serv. | | |
| Conf. Screen | | |
| Letters | | |
| Duties/Supp | | |
| Objections | | |
| Video Receipt | | |
| CI Report | | |
| 9202 | | |
| Order | | |
| Aff. Posting | | |
| Status Rpt | x | |
| UCCJEA | | |
| Citation | | |
| FTB Notice | | |
| | | Reviewed by: SEF |
| | | Reviewed on: 10/24/2016 |
| | | Updates: |
| | | Recommendation: |
| | | File 8- Woof |

Status RE: Filing of the First or Final Account

| | | |
|----------------------|---|--|
| DOD: 1/13/15 | <p>ROBERT SEAN BAKER, Son, was appointed Administrator without IAEA and without bond on 6/8/15.</p> <p>At the hearing on 6/8/15, the Court set a status hearing for 8/9/16 for the filing of the first or final account.</p> <p>At the status hearing on 8/9/16, there were no appearances and the Court issued this Order to Show Cause to Daniel Bruce as to why he should not be sanctioned for his failure to appear, and to Robert Baker, as to why he should not be removed as Administrator for his failure to file a first or final account.</p> <p>At continued OSC hearing on 9/27/16, counsel represented that he was nearing completion of the accounting. Mr. Bruce and Mr. Baker were each admonished with regard to possible sanctions and/or removal if the petition is not filed, and both are ordered to be personally present or present via CourtCall on 11/1/16 if the petitioner has not been filed.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need first account or petition for final distribution pursuant to Probate Code §12200 or written status report pursuant to Local Rule 7.5.</p> |
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| Aff.Sub.Wit. | | |
| Verified | | |
| Inventory | | |
| PTC | | |
| Not.Cred. | | |
| Notice of Hrg | | |
| Aff.Mail | | |
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| 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: skc</p> <p>Reviewed on: 10/24/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 9- Richardson</p> | |

**First and Final Account and Report of (Successor) Administrator and
Petition for Allowance of Ordinary and Extraordinary Commissions and
Fees and for Distribution**

| | | | |
|-------------------------------------|----------------------|---|---|
| DOD: 11/2/14 | | PUBLIC ADMINISTRATOR , Administrator, is petitioner. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 9/12/16. Minute order states the matter is continued for 90 days to allow Carl Johnston time to act on the rejection of part of his claim. – As of 10/25/16 it appears that no action has been filed on the rejected claim.</p> <p>Note: Stipulation to Assign Distribution was filed on 9/14/16 indicating Linda Churchill has assigned her interest in the estate to Stephanie Johnston. If the Court accepts the assignment then will need revised order.</p> |
| | | Account period: 1/1/15 – 7/20/16 | |
| Cont. from 091216 | | Accounting - \$23,349.56 | |
| <input type="checkbox"/> | Aff.Sub.Wit. | Beginning POH - \$23,304.59 | |
| <input checked="" type="checkbox"/> | Verified | Ending POH - \$23,000.10 | |
| <input checked="" type="checkbox"/> | Inventory | Administrator (statutory) - \$933.99 | |
| <input type="checkbox"/> | PTC | | |
| <input checked="" type="checkbox"/> | Not.Cred. | Attorney (statutory) - \$933.99 | |
| <input checked="" type="checkbox"/> | Notice of Hrg | | |
| <input checked="" type="checkbox"/> | Aff.Mail | Bond (o.k.) - \$58.38 | |
| <input type="checkbox"/> | Aff.Pub. | | |
| <input type="checkbox"/> | Sp.Ntc. | Court fees (certified copies) - \$25.50 | |
| <input type="checkbox"/> | Pers.Serv. | | |
| <input type="checkbox"/> | Conf. Screen | Creditor (Carl Johnston) - \$7,871.53 | |
| <input checked="" type="checkbox"/> | Letters | Closing reserve - \$2,000.00 | |
| <input type="checkbox"/> | Duties/Supp | | |
| <input type="checkbox"/> | Objections | Distribution, pursuant to intestate succession, is to: | |
| <input type="checkbox"/> | Video Receipt | Linda Churchill - \$3,370.82 and ½ interest in personal property. | |
| <input type="checkbox"/> | CI Report | | |
| <input checked="" type="checkbox"/> | 9202 | | |
| <input checked="" type="checkbox"/> | Order | Carl Johnston - \$3,370.82 and ½ interest in personal property. | |
| <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: KT | |
| | | Reviewed on: 10/24/16 | |
| | | Updates: | |
| | | Recommendation: | |
| | | File 10- Johnston | |

First and Final Account/Waiver of Account and Report of Petitioner, Petition for Final Distribution

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|-------------------------------------|----------------------|---|---|--------|
| DOD: 2/11/15 | | <p>RICHARD T. WHEELER, ESQ., Administrator, is Petitioner.</p> <p>Accounting is waived</p> <p>I&A: \$184,752.49 POH: \$173,828.05 consisting of \$6,028.05 cash plus real property, vehicle, and misc. personal property</p> <p>Administrator (Statutory): Waived</p> <p>Closing: \$500.00</p> <p>Distribution pursuant to intestate succession:</p> <p>Reuben E. Frausto, Jr.: 1/2 Jennifer Luna: 1/2</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Fresno County Federal Credit Union filed a Creditor's Claim re the decedent's mortgage loan for \$108,957.72, which was allowed. Petitioner states the loan was assumed by the heirs and requests to distribute the real property to the heirs. The Court may require consent by the creditor to the distribution or withdrawal of the claim. Need written consent from both heirs to distribution of assets in undivided interests pursuant to Local Rules 7.12.3 and 7.12.4. Need revised order specifying the distribution to each heir. | |
| <input type="checkbox"/> | Aff.Sub.Wit. | | | |
| <input checked="" type="checkbox"/> | Verified | | | |
| <input checked="" type="checkbox"/> | Inventory | | | |
| <input checked="" type="checkbox"/> | PTC | | | |
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| <input type="checkbox"/> | Objections | | | |
| <input type="checkbox"/> | Video Receipt | | | |
| <input type="checkbox"/> | CI Report | | | |
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| <input type="checkbox"/> | Citation | | | |
| <input checked="" type="checkbox"/> | FTB Notice | | | |
| Reviewed by: skc | | | | |
| Reviewed on: 10/24/16 | | | | |
| Updates: | | | | |
| Recommendation: | | | | |
| File 11- Frausto | | | | |

Attorney Lopez, Amy (for Petitioner, Maternal Grandmother Judith Jackson)
 Attorney Rich Mount, Sheri (for Objector, Maternal Grandfather Bobby Gene Jackson)

Petition for Appointment of Guardian of the Person

| | | | |
|-------------------------------------|---------------|---------------------------|--|
| | | See petition for details. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 8/17/16:</u> Ms. Mount represents that Bobby Jackson will be filing a competing petition. (Trial set for 10/18/16 vacated.)</p> <p>Page B is Pat. Grandmother Alma Suarez' petition for visitation.</p> <p>Page C is Mat. Grandfather Bobby Jackson's competing petition.</p> <p>As of 10/24/16, the following issues remain noted:</p> <ol style="list-style-type: none"> 1. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: <ul style="list-style-type: none"> - Kelsey's paternal grandparents (unknown) 2. Need revised Order, Letters due to recently updated Judicial Council forms. <p>Note: Kelsey's father Samuel Beauchamp signed the consent and also filed an objection to the competing petition. Petitioner may be able to inquire with him as to his parents' information for service.</p> |
| Cont. from 071316, 081716 | | | |
| <input type="checkbox"/> | Aff.Sub.Wit. | | |
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| <input type="checkbox"/> | Sp.Ntc. | | |
| <input type="checkbox"/> | Pers.Serv. | | |
| <input checked="" type="checkbox"/> | Conf. Screen | | |
| <input checked="" type="checkbox"/> | Letters | | |
| <input checked="" type="checkbox"/> | Duties/Supp | | |
| <input checked="" 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: 10/24/16 | | | |
| Updates: | | | |
| Recommendation: | | | |
| File 12A- Jackson | | | |

12B Quinn Jackson, Kelsey Jackson (GUARD/P) Case No. 15CEPR00764

Petitioner Suarez, Alma D. (Pro Per – Paternal Grandmother – Petitioner)

Petitioner Armiento, Arnold (Pro Per – Paternal Step-Grandfather – Petitioner)

Petition for Visitation

| | | | |
|---------------------------|---------------|---|---|
| See petition for details. | | | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Trial originally set for 10/18/16 was vacated per Min. Order of 9/13/16.</p> <p>As of 10/24/16, the following issues remain noted:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing on interested parties: <ul style="list-style-type: none"> - Judith Jackson (Maternal Grandmother and proposed guardian) - Samuel Beauchamp (Kelsey's father) |
| Cont. from 081716 | | | |
| | 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 | | |
| | 9202 | | |
| | Order | | |
| | Aff. Posting | | |
| | Status Rpt | | |
| | UCCJEA | | |
| | Citation | | |
| | FTB Notice | | |
| | | | Reviewed by: skc |
| | | | Reviewed on: 10/24/16 |
| | | | Updates: |
| | | | Recommendation: |
| | | | File 12B- Jackson |

12C Quinn Jackson, Kelsey Jackson (GUARD/P) Case No. 15CEPR00764

Attorney Rich Mount, Sheri (for Petitioners Bobby Gene Jackson and Patricia Barbala)

Attorney Lopez, Amy (for Objector Judith Jackson)

Objector Beauchamp, Samuel (Kelsey's father, Objector)

Petition for Appointment of Guardian of the Person

| | | |
|---------------------------|---------------|---|
| See petition for details. | | NEEDS/PROBLEMS/ COMMENTS: Court Investigator to provide report, clearances. 1. Need proof of <u>personal</u> service of Notice of Hearing with a copy of this temp petition at least five court days prior to the hearing per Probate Code §2250(e) on: - Samuel Beauchamp (Kelsey's father). (Mailed notice is not appropriate.) 2. Maternal Grandmother and original petitioner Judith Jackson was not served directly; service was "c/o" her former attorney. The Court may require proper direct service per Probate Code §1511, CRC 7.51. 3. Need notice to Kelsey's paternal grandparents pursuant to Probate Code §1511. |
| | | |
| | 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 | X |
| | Clearances | X |
| ✓ | Order | |
| | Aff. Posting | |
| | Status Rpt | |
| ✓ | UCCJEA | |
| | Citation | |
| | FTB Notice | |
| | | Reviewed by: skc |
| | | Reviewed on: 10/24/16 |
| | | Updates: |
| | | Recommendation: |
| | | File 12C- Jackson |

12C

Petition to Determine Succession to Real Property

| | | | | |
|-------------------------------------|---------------|--|--|---|
| DOD: 2/14/16 | | <p>DANNICA B. DUONG, mother and Guardian of the Estate of Decedent's minor son BARON METTEYA DUONG, is Petitioner.</p> <p>40 days since DOD</p> <p>No other proceedings</p> <p>I&A: \$100,000.00 (real property located at 4809 E. Atchison in Fresno)</p> <p>Decedent died intestate</p> <p>Petitioner states the Decedent was <u>not</u> a resident of California at the time of his death, but died owning property in this county.</p> <p>Petitioner states no proceeding for administration has been conducted in California and no proceeding has commenced in another jurisdiction.</p> <p>Petitioner requests Court determination that Decedent's real property passes to her 100% as guardian for Decedent's minor son BARON METTEYA DUONG for the benefit of the minor.</p> <p>Attachment #13 contains a certified copy of "Order of Appointment of Guardian/Conservator for Minor," case titled "IN RE: Estate of Baron Duong" (Laurel Circuit/ District Court, Commonwealth of Kentucky) entered 4/4/16, the petition therefor, and a certified copy of Baron Metteya Duong's birth certificate (County of Fresno) reflecting Dannica B. Duong as mother and Ernie Chap Tess as father of Baron Metteya Duong, minor.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 9/20/16: NO APPEARANCES. Ronald Calhoun is ordered to be personally present or present via CourtCall on 11/1/16 so that the Court can consider whether or not to deny the petition.</p> <p>Minute Order 8/18/16: The Court directs Mr. Calhoun to investigate the issue of heirs, which were found in a search by the examiner.</p> <p>As of 10/24/16, nothing further has been filed.</p> <p>1. Petitioner lists only herself and minor Baron Metteya Duong at Attachment #14; however, Court records reflect that this minor may not be the only heir. The Court may require further diligence or clarification.</p> <p>Declaration of Dannica B. Duong filed 8/17/16 states she and the decedent were never married, and had one son, Baron Metteya Duong and no daughters. The decedent's parents have died and he had no brothers or sisters. Baron Metteya Duong is his only child and sole heir.</p> | |
| Cont. from 081816, 092016 | | | | |
| <input type="checkbox"/> | Aff.Sub.Wit. | | | |
| <input checked="" type="checkbox"/> | Verified | | | |
| <input checked="" type="checkbox"/> | Inventory | | | |
| <input type="checkbox"/> | PTC | | | |
| <input type="checkbox"/> | Not.Cred. | | | |
| <input checked="" type="checkbox"/> | Notice of Hrg | | | |
| <input checked="" type="checkbox"/> | Aff.Mail | | | w |
| <input type="checkbox"/> | Aff.Pub. | | | |
| <input type="checkbox"/> | Sp.Ntc. | | | |
| <input type="checkbox"/> | Pers.Serv. | | | |
| <input type="checkbox"/> | Conf. Screen | | | |
| <input type="checkbox"/> | Letters | | | |
| <input type="checkbox"/> | Duties/Supp | | | |
| <input type="checkbox"/> | Objections | | | |
| <input type="checkbox"/> | Video Receipt | | | |
| <input type="checkbox"/> | CI Report | | | |
| <input type="checkbox"/> | 9202 | | | |
| <input checked="" type="checkbox"/> | Order | | | |
| <input type="checkbox"/> | Aff. Posting | | | |
| <input type="checkbox"/> | Status Rpt | | | |
| <input type="checkbox"/> | UCCJEA | | | |
| <input type="checkbox"/> | Citation | | | |
| <input type="checkbox"/> | FTB Notice | | | |
| Reviewed by: skc | | | | |
| Reviewed on: 10/24/16 | | | | |
| Updates: | | | | |
| Recommendation: | | | | |
| File 15- Tess | | | | |

Attorney
Objectors

Aguirre, L. Kim (for Petitioner Mai Doua Thao)
Lee Seng Thao and Xee Moua – Parents, in pro per, formerly represented by
Attorney Sheri Rich Mount)

Petition for Appointment of Guardian of the Person

| | | | | |
|-------------------|---------------|---------------------------|---|---|
| | | See petition for details. | <p>NEEDS/PROBLEMS/ COMMENTS:</p> <p><u>Minute Order 9/20/16:</u> Matter continued due to the remaining defects. Ms. Mount's oral request for additional visitation is denied; she may file paperwork with proper notice.</p> <p><u>Note:</u> On 8/1/16, the Court ordered that the minor is not to leave the State of California nor the County of Fresno for any reason. See Minute Orders of 8/1/16 and 8/8/16 re visitation.</p> <p><u>Note:</u> It appears all notice issues have been cured. The following issue remains noted:</p> <p>1. Need Order, Letters per Local Rule 7.1.1.F.</p> | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Cont. from 092016 | | | | |
| | Aff.Sub.Wit. | | | |
| ✓ | Verified | | | |
| | Inventory | | | |
| | PTC | | | |
| | Not.Cred. | | | |
| ✓ | Notice of Hrg | | | |
| ✓ | Aff.Mail | | | W |
| | Aff.Pub. | | | |
| | Sp.Ntc. | | | |
| | Pers.Serv. | | | |
| ✓ | Conf. Screen | | | |
| | Letters | | | X |
| ✓ | Duties/Supp | | | |
| ✓ | Objections | | | |
| | Video Receipt | | | |
| ✓ | CI Report | | | |
| ✓ | Clearances | | | |
| | Order | | | X |
| | Aff. Posting | | | |
| | Status Rpt | | | |
| ✓ | UCCJEA | | | |
| | Citation | | | |
| | FTB Notice | | | |
| | | Reviewed by: skc | | |
| | | Reviewed on: 10/24/16 | | |
| | | Updates: | | |
| | | Recommendation: | | |
| | | File 16- Thao | | |

Petition for Appointment of Guardian of the Person

| | | | |
|--------------------------|----------------------|--|---|
| | | <u>TEMPORARY DENIED/DISMISSED 8/24/2016</u> | NEEDS/PROBLEMS/COMMENTS: |
| | | TAISHA PAGGETT, paternal half-sister, is petitioner. | |
| | | <i>Please see petition for details.</i> | <p>Continued from 9/22/2016.</p> <p>Minute order dated 9/22/2016 states Kapria Armstrong (mother) provides drug test results to the Court that are to be held in the confidential envelope. Ms. Jones requests a hair follicle test; Ms. Armstrong declines to submit to the test. Ms. Armstrong represents that her mother's name is Cynthia Carr and her father, James Carr, is deceased. Ms. Jones is to verify the death and ICWA status. Matter is continued for additional investigation by DSS.</p> <p>1. Per minute order dated 9/22/2016, need verification of the death of James Carr (maternal grandfather).</p> |
| Cont. from 092216 | | | |
| | 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 | | |
| | 9202 | | |
| ✓ | Order | | |
| | Aff. Posting | | |
| | Status Rpt | | |
| ✓ | UCCJEA | | |
| | Citation | | |
| ✓ | ICWA | | |
| | | | Reviewed by: SEF |
| | | | Reviewed on: 10/24/2016 |
| | | | Updates: 10/25/2016 |
| | | | Recommendation: |
| | | | File 17- Paggett |

Attorney Leah Luisa Tuisavalalo (for Petitioners James Flores and Bertha Flores)

Petition for Appointment of Guardian of the Person

| | | | |
|-------------------|---------------|--|---|
| | | NO TEMPORARY REQUESTED | NEEDS/PROBLEMS/COMMENTS: <u>Page 18B</u> is the <i>Petition for Special Immigrant Juvenile Findings</i> . <u>Continued from 10/4/2016</u> . Minute Order states continued due to the defects listed in the examiner notes. The following issues from the previous hearing remain: 1. Need proof of personal service 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"> • Unknown father; (Note: <i>Declaration of Dilan Rivas states the mother does not know the identity of his father.</i>) 2. 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"> • paternal grandparents; (Note: <i>Declaration of Dilan Rivas states the mother does not know the identity of his father.</i>) • Atziry Noel Aguilar Rivas, half-sibling, if age 12 or over; • Brisa Dariana Aguilar Rivas, half-sibling, if age 12 or over. 3. Need proposed letters. |
| | | <p>JAMES FLORES and BERTHA FLORES, maternal grandparents, are Petitioners.</p> <p style="text-align: center;">~Please see petition for details~</p> <p>Court Investigator's Report was filed on 9/26/2016.</p> | |
| Cont. from 100416 | | | |
| | Aff.Sub.Wit. | | |
| ✓ | Verified | | |
| | Inventory | | |
| | PTC | | |
| | Not.Cred. | | |
| ✓ | Notice of Hrg | | |
| | Aff.Mail | X | |
| | Aff.Pub. | | |
| | Sp.Ntc. | | |
| ✓ | Pers.Serv. | | |
| ✓ | Conf. Screen | | |
| | Letters | X | |
| ✓ | Duties/Supp | | |
| | Objections | | |
| | Video Receipt | | |
| ✓ | CI Report | | |
| ✓ | Clearances | | |
| ✓ | Order | | |
| | Aff. Posting | | |
| | Status Rpt | | |
| ✓ | UCCJEA | | |
| | Citation | | |
| | FTB Notice | | |
| | | Reviewed by: LEG | |
| | | Reviewed on: 10/25/16 | |
| | | Updates: | |
| | | Recommendation: | |
| | | File 18A- Rivas | |

Petition for Compensation

| | | | |
|---|---------------|---|--|
| | | <p>J. STANLEY TEIXEIRA, Court appointed attorney for Conservatee, is Petitioner.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> |
| | | | |
| | | <p>Petitioner was appointed to represent the Conservatee on 8/17/16.</p> | |
| | | | |
| | Aff.Sub.Wit. | <p>The FRESNO COUNTY PUBLIC GUARDIAN was appointed Conservator of the person and estate on 9/13/16.</p> | |
| ✓ | Verified | | |
| | Inventory | <p>Petitioner requests fees in connection with his representation of the Conservatee for the Public Guardian's petition for appointment.</p> | |
| | PTC | | |
| | Not.Cred. | <p>Petitioner asks that he be paid \$630.00 for 1.1 hours @ \$300/hr plus his \$435.00 filing fee. Itemization includes review of documents, meeting with client.</p> | |
| ✓ | 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: skc</p> |
| | | | <p>Reviewed on: 10/24/16</p> |
| | | | <p>Updates:</p> |
| | | | <p>Recommendation:</p> |
| | | | <p>File 19- Perry</p> |

Petitioner Queenie Dorris-Hill (Pro Per)

Petition for Probate of Will and for Letters Testamentary

| | | |
|--|--|--|
| DOD: 7/6/2016 | QUEENIE DORRIS-HILL , [relationship unspecified] named Co-Executor without bond, is Petitioner. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED TO 12/13/2016 Per Petitioner's request</p> <ol style="list-style-type: none"> 1. Need copy of Decedent's Will pursuant to Probate Code § 8002(b)(1), which requires a copy of the will be attached to a petition for probate of will as Attachment 3(e)(2). 2. Decedent's original Will deposited on 8/8/2016 shows the Will was not executed in accordance with Probate Code § 6110, as the Will was not witnessed by being signed by two persons as required under Probate Code § 6110(c)(1). Given that there are no subscribing witnesses to the Will, Petitioner as proponent of the Will in support of the instant <i>Petition</i> must establish by clear and convincing evidence that, at the time the testator signed the Will, the testator intended the Will to constitute her Will, pursuant to Probate Code § 6110(c)(2) which allows treatment of a will not executed in compliance with Probate Code § 6110(c)(1) as if it was executed in compliance with the Probate Code requirements. <p align="center">~Please see additional page~</p> |
| Cont. from 092016 | Full IAEA: Need publication | |
| <input type="checkbox"/> Aff.Sub.Wit. | Will Dated: 6/20/2016 | |
| <input checked="" type="checkbox"/> Verified | Residence: Fresno | |
| <input type="checkbox"/> Inventory | Publication: Need publication | |
| <input type="checkbox"/> Copy X | <p>Estimated value of the Estate:</p> <p>Real property - \$73,360.00</p> <p>Personal property - \$ 1,250.00</p> <p>Total - \$74,610.00</p> | |
| <input type="checkbox"/> Not.Cred. | | |
| <input checked="" type="checkbox"/> Notice of Hrg | | |
| <input checked="" type="checkbox"/> Aff.Mail W/ | | |
| <input type="checkbox"/> Aff.Pub. X | | |
| <input type="checkbox"/> Sp.Ntc. | | |
| <input type="checkbox"/> Pers.Serv. | | |
| <input type="checkbox"/> Conf. Screen | | |
| <input checked="" type="checkbox"/> Letters | | |
| <input checked="" type="checkbox"/> Duties/Supp | | |
| <input type="checkbox"/> Objections | Probate Referee: Steven | |
| <input type="checkbox"/> Video Receipt | | |
| <input type="checkbox"/> CI Report | | |
| <input type="checkbox"/> 9202 | | |
| <input checked="" type="checkbox"/> Order | | |
| <input type="checkbox"/> Aff. Posting | | |
| <input type="checkbox"/> Status Rpt | | |
| <input type="checkbox"/> UCCJEA | | |
| <input type="checkbox"/> Citation | | |
| <input type="checkbox"/> FTB Notice | | |
| | | Reviewed by: LEG |
| | | Reviewed on: 10/25/16 |
| | | Updates: |
| | | Recommendation: |
| | | File 20- McLemore |

NEEDS/PROBLEMS/COMMENTS, continued:

3. Item 3(f)(1)(d) of the *Petition* is incomplete re: other named executor. Need declination to act as personal representative from **VIVIAN ROSS-EATON**, named Co-Executor in the Will, waiving her right to appointment as provided under Probate Code § 8420.
4. Need *Affidavit of Publication* showing newspaper publication of the Petitioners' request for appointment pursuant to Probate Code §§ 8120 – 8124, and Local Rule 7.9.
5. Item 8 the *Petition* does not but should include the names, relationships, and addresses of the Petitioner, the named Co-Executor, and if applicable, the names of any stepchild or foster child of the Decedent.
- 6. Item 5(a)(2)(b) of the *Petition* states Decedent's spouse is deceased. Item 8 of the *Petition* does not include the name and date of death of the deceased spouse pursuant to Local Rule 7.1.1(D), which provides that if a beneficiary, heir, child, spouse or registered domestic partner in any action before the Probate Court is deceased, that person's date of death shall be included in the petition.**
7. Item 5(b) of the *Petition* is incomplete as to whether decedent was survived by a stepchild or foster child or children who would have been adopted by Decedent but for a legal barrier.

Petitioner Gaines, Diane Marie (Pro Per Petitioner)

Petitioner Gaines, Paul Herbert (Pro Per Petitioner)

Petition for Appointment of Guardian of the Person

| | | |
|-------------------------------------|---------------------------|--|
| | See petition for details. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator to file report, clearances.</p> |
| <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 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 | 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: 10/25/16 |
| | | Updates: |
| | | Recommendation: |
| | | File 21- Johnson/ Spolini |

22 Chastity Stewart, Destiney Dixon, Trinity Stewart (GUARD/P)

Case No. 16CEPR00906

Petitioner Morgan, Stephanie (Pro Per – Maternal Grandmother – Petitioner)

Petition for Appointment of Guardian of the Person

| | | | | |
|---|---------------|---------------------------|--|---|
| | | See petition for details. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: <ul style="list-style-type: none"> - Wendell Moten (Chastity's father) - Father of Trinity 2. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: <ul style="list-style-type: none"> - Paternal Grandfather of Chastity - Paternal Grandfather of Destiney - Paternal Grandfather of Trinity - Paternal Grandmother of Trinity | |
| | | | | |
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| | | | | |
| | 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: 10/25/16 | |
| | | | Updates: | |
| | | | Recommendation: | |
| | | | File 22- Stewart/ Dixon | |

23 The Carl Vernon and Laverne V. Pielop Family Trust Case No. 16CEPR00969

Attorney **Armas, J. Todd (for Petitioner Vanessa Poeschel)**

Petition to Compel Trustee to Comply with Probate Code Sections 16060 and 16061.7, to Account, for Relief from Breach of Trust, for Suspension of Trustee and for Removal of Trustee (Probate Code Sec. 164200, 17200(b)(10))

| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|---------------------------|---|-------------|--|--------------------------|--|--------------|--|--|--|--|--|--|--|--------------------------|--------------|-------------------------------------|----------|--------------------------|-----------|--------------------------|-----|--------------------------|-----------|--------------------------|---------------|---|--------------------------|----------|---|--------------------------|----------|--|--------------------------|---------|--|--------------------------|------------|--|--------------------------|--------------|--|--------------------------|---------|--|--------------------------|-------------|--|--------------------------|------------|--|--------------------------|---------------|--|--------------------------|-----------|--|--------------------------|------|--|-------------------------------------|-------|--|--------------------------|--------------|--|--------------------------|------------|--|--------------------------|--------|--|--------------------------|----------|--|--------------------------|------------|--|--|--|
| <table border="1"> <tr> <td colspan="2">Carl Vernon Pielop</td> </tr> <tr> <td colspan="2">DOD: 1/6/06</td> </tr> <tr> <td colspan="2">Laverne V. Pielop</td> </tr> <tr> <td colspan="2">DOD: 9/23/15</td> </tr> <tr> <td colspan="2"> </td> </tr> <tr> <td colspan="2"> </td> </tr> <tr> <td colspan="2"> </td> </tr> <tr> <td><input type="checkbox"/></td> <td>Aff.Sub.Wit.</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Verified</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Inventory</td> </tr> <tr> <td><input type="checkbox"/></td> <td>PTC</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Not.Cred.</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Notice of Hrg</td> <td>x</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Aff.Mail</td> <td>x</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Aff.Pub.</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Sp.Ntc.</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Pers.Serv.</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Conf. Screen</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Letters</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Duties/Supp</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Objections</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Video Receipt</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>CI Report</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>9202</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Order</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Aff. Posting</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Status Rpt</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>UCCJEA</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Citation</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>FTB Notice</td> <td></td> </tr> </table> | Carl Vernon Pielop | | DOD: 1/6/06 | | Laverne V. Pielop | | DOD: 9/23/15 | | | | | | | | <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. | | <input type="checkbox"/> | Conf. Screen | | <input type="checkbox"/> | Letters | | <input type="checkbox"/> | Duties/Supp | | <input type="checkbox"/> | Objections | | <input type="checkbox"/> | Video Receipt | | <input type="checkbox"/> | CI Report | | <input type="checkbox"/> | 9202 | | <input checked="" type="checkbox"/> | Order | | <input type="checkbox"/> | Aff. Posting | | <input type="checkbox"/> | Status Rpt | | <input type="checkbox"/> | UCCJEA | | <input type="checkbox"/> | Citation | | <input type="checkbox"/> | FTB Notice | | <p>VANESSA POESCHEL, Daughter and Beneficiary, is Petitioner.</p> <p>Petitioner states she is a beneficiary of the Carl Vernon and Laverne V. Pielop Family Trust (Pielop Trust) executed by Carl and Laverne Pielop on 4/1/91 in Fresno, CA.</p> <p>Carl Pielop died 1/6/06. Laverne Pielop died 9/23/15. Since 9/23/15, KAREN PETERSON, a resident of Potomac Maryland, has been and currently is the Trustee of the Pielop Trust.</p> <p>The trustee has never provided Petitioner with notice required under Probate Code §16061.7 or an account of the trust. Throughout 2015, Petitioner asked the trustee for status and a breakdown of transactions made by her as trustee. The only reply was an email dated 11/9/15, which provided no information (Exhibit A).</p> <p>On 6/8/16, Petitioner emailed the trustee some information on trusts that she had acquired when she herself had been a trustee (Exhibit B).</p> <p>On 7/14/16, Petitioner hired Attorney Armas to reach out to the trustee (Exhibit C). Correspondence was received from the trustee that she retained an attorney, but no other information was provided. Nearly 1 year has passed since the surviving settlor's death.</p> <p>Probate Code §16062 provides for annual accounting to beneficiaries, and §16000 puts a duty on the trustee to administer the trust according to the trust instrument, which requires annual accountings.</p> <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need clarification as to Fresno, CA, as proper venue for this petition pursuant to Probate Code §17005(a)(1). The trustee resides in Potomac, MD and appears to have been administering the trust there since 9/23/15. 2. Petitioner does not provide a copy of the trust for review. Need copy of trust for Court review. 3. Need Notice of Hearing. 4. Need proof of service of Notice of Hearing at least 30 days prior to the hearing on interested parties pursuant to Probate Code §17203: <ul style="list-style-type: none"> - Karen Peterson (Trustee) and her attorney, if any - Cris Schneider Estate c/o Brett Dixon (unclear whether Brett Dixon is the personal representative or an heir or whether additional heirs may be entitled to notice) <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p> <p>Reviewed by: skc</p> <p>Reviewed on: 10/25/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 23- Vernon/ Pielop</p> |
| Carl Vernon Pielop | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| DOD: 1/6/06 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Laverne V. Pielop | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| DOD: 9/23/15 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| <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. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Conf. Screen | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Letters | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Duties/Supp | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Objections | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Video Receipt | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | CI Report | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | 9202 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> | Order | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Aff. Posting | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Status Rpt | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | UCCJEA | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Citation | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | FTB Notice | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

23 The Carl Vernon and Laverne V. Pielop Family Trust Case No. 16CEPR00969

Page 2

Petitioner alleges that the trustee has transferred the settlor's vehicle to her son in violation of her duty not to use trust property for the trustee's own profit or for any other purpose unconnected with the trust. See § 16004(a). Petitioner alleges that the trustee is in breach of her duties as trustee as she has:

- a) Failed to provide Petitioner with information related to her interest in the trust as requested by Petitioner as required under Probate Code § 16061;
- b) Failed to provide the beneficiaries with an annual account as required under § 16062;
- c) Used trust funds for her own profit and for purposes unconnected with the trust.

Petitioner alleges that there has been a loss in value of the trust estate as a proximate result of the trustee's numerous breaches.

Petitioner states the beneficiaries are Petitioner, the Estate of Cris Schneider, c/o Brett Dixon of Lake Forest, CA, and Karen Peterson, named as Karen Braun in the trust, of Potomac, MD.

Petitioner requests that:

- 1. Trustee be compelled to prepare and file with this court an account of the Pielop Trust from 9/23/15 to present;**
- 2. Trustee be compelled to redress her breaches of trust by payment of money damages according to proof;**
- 3. Trustee be removed as trustee of the Pielop Trust;**
- 4. Trustee be suspended as trustee of the Pielop Trust and the court appoint a temporary trustee to take possession of the trust property and administer the trust;**
- 5. The Court order such attorney fees and costs as it may be allowed by law;**
- 6. The Court order such other and further relief as it may seem (sic) proper.**

NEEDS/PROBLEMS/COMMENTS (Cont'd):

- 5. Petitioner requests suspension and removal of the trustee and appointment of a temporary trustee, but does not specify or nominate anyone as temporary or successor trustee. Need clarification.**
- 6. If a temporary or successor trustee is appointed who is not named in the trust instrument, bond is required pursuant to Probate Code §15602 unless waived by all adult beneficiaries. Need estimated value of trust for bond purposes.**

Petition for Appointment of Probate Conservator of the Person

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| | | TEMPORARY EXPIRES 11/1/2016 | NEEDS/PROBLEMS/COMMENTS: |
| | | | |
| | | STEVEN MENDRIN and STACY SHUBIN , son and daughter, are petitioners and request that STACY SHUBIN be appointed conservator of the person with medical consent and dementia powers. | Minute order dated 10/4/2016 states the court orders Karen Nazaroff is to make no attempts to remove the conservatee from her current placement and is to abide by all rules of the facility. |
| Cont. from | | <i>Please see petition for details.</i> | |
| <input type="checkbox"/> | Aff.Sub.Wit. | | <p>1. Need <i>Capacity Declaration</i> from physician in support of request for medical consent and dementia powers.</p> <p>Court Investigator Julie Negrete to provide:</p> <ul style="list-style-type: none"> • Advisement of rights • Investigation report |
| <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 checked="" type="checkbox"/> | Video Receipt | | |
| <input type="checkbox"/> | CI Report | x | |
| <input type="checkbox"/> | 9202 | | |
| <input checked="" type="checkbox"/> | Order | | |
| <input type="checkbox"/> | Aff. Posting | | |
| <input type="checkbox"/> | Status Rpt | | |
| <input type="checkbox"/> | UCCJEA | | |
| <input checked="" type="checkbox"/> | Citation | | |
| <input type="checkbox"/> | FTB Notice | | |
| | | | Reviewed by: SEF |
| | | | Reviewed on: 10/25/2016 |
| | | | Updates: |
| | | | Recommendation: |
| | | | File 24- Mendrin |

Petition to Determine Succession to Real Property

| | | | |
|-------------------------------------|----------------------|--|--|
| DOD: 12/15/15 | | SOFIA ACEVEDO , Daughter, is Petitioner. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Need amended petition due to the following defects:</u></p> <ol style="list-style-type: none"> 1. Need date of death of the decedent's deceased spouse pursuant to Local Rule 7.1.1.D. 2. Need Attachment 11, which should set forth the legal description and APN and state the decedent's interest in the real property. 3. Petitioner states the decedent died testate, but no will is attached to this petition. 4. Petitioner attached a trust entitled The Celestina Sanchez De Cortez and Juan Cortez Lopez Revocable Living Trust dated 11/9/01 which lists the subject real property as an asset of the trust. If the real property is an asset of the trust, this summary procedure is inappropriate. Need clarification re how the real property was held at the decedent's death. 5. #13 does not specify the interest Petitioner is claiming in the real property. <u>Note:</u> It is unclear if Petitioner is claiming the property individually or as trustee of the trust that is attached to the petition. <p style="text-align: right;">SEE PAGE 2</p> |
| | | 40 days since DOD | |
| | | No other proceedings | |
| <input type="checkbox"/> | Aff.Sub.Wit. | | |
| <input checked="" type="checkbox"/> | Verified | I&A: \$150,000.00 (real property located at 11420 S. Cornelia in Caruthers, CA) | |
| <input checked="" type="checkbox"/> | Inventory | | |
| <input type="checkbox"/> | PTC | | |
| <input type="checkbox"/> | Not.Cred. | Will dated: ??? | |
| <input checked="" type="checkbox"/> | Notice of Hrg | (Rather than a will, attached to the petition is a copy of a Declaration of Trust entitled The Celestina Sanchez De Cortez and Juan Cortez Lopez Revocable Living Trust, which lists the subject property on Schedule A as an asset of the trust.) | |
| <input checked="" type="checkbox"/> | Aff.Mail | W | |
| <input type="checkbox"/> | Aff.Pub. | Petitioner requests Court determination ??? | |
| <input type="checkbox"/> | Sp.Ntc. | (#13 lists only the address and APN of the subject property, but does not indicate the interest claimed by Petitioner.) | |
| <input type="checkbox"/> | Pers.Serv. | | |
| <input type="checkbox"/> | Conf. Screen | | |
| <input type="checkbox"/> | Letters | | |
| <input type="checkbox"/> | Duties/Supp | | |
| <input type="checkbox"/> | Objections | | |
| <input type="checkbox"/> | Video Receipt | | |
| <input type="checkbox"/> | CI Report | | |
| <input type="checkbox"/> | 9202 | | |
| <input checked="" type="checkbox"/> | Order | | |
| <input type="checkbox"/> | Aff. Posting | | |
| <input type="checkbox"/> | Status Rpt | | |
| <input type="checkbox"/> | UCCJEA | | |
| <input type="checkbox"/> | Citation | | |
| <input type="checkbox"/> | FTB Notice | | |
| | | | Reviewed by: skc |
| | | | Reviewed on: 10/24/16 |
| | | | Updates: |
| | | | Recommendation: |
| | | | File 25- Lopez |

Page 2 – NEEDS/PROBLEMS/COMMENTS (CONT'D):

6. Petitioner filed a Declaration of Diligence Search and Request to Dispense with Notice of Elizabeth Cortez, daughter of the decedent. The Court may require further diligence or proper notice to Elizabeth Cortez pursuant to Probate Code §13153.
7. Need revised proposed order including legal description of real property.
8. This petition was filed with a fee waiver. If assets are passed via this petition, the filing fee will be due.

Note: Upon further review of amended petition, additional issues may arise.

Petition for Appointment of Temporary Conservator of the Person

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|-------------------------------------|---------------|---------------------------|--|---|
| | | See petition for details. | <p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Court Investigator advised rights on 10/13/16.</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 temp petition at least five court days prior to the hearing per Probate Code §2250(e) on Proposed Conservatee Nicholas Robledo. 3. Need proof of service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) on all relatives listed at #11 of the petition. 4. If granted, the Court may require that Letters not issue until the effective date of the order, which would be 11/14/16. | |
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| <input type="checkbox"/> | Aff.Sub.Wit. | | | |
| <input checked="" type="checkbox"/> | Verified | | | |
| <input type="checkbox"/> | Inventory | | | |
| <input type="checkbox"/> | PTC | | | |
| <input type="checkbox"/> | Not.Cred. | | | |
| <input type="checkbox"/> | Notice of Hrg | | | X |
| <input type="checkbox"/> | Aff.Mail | | | X |
| <input type="checkbox"/> | Aff.Pub. | | | |
| <input type="checkbox"/> | Sp.Ntc. | | | |
| <input type="checkbox"/> | Pers.Serv. | | | X |
| <input checked="" type="checkbox"/> | Conf. Screen | | | |
| <input checked="" type="checkbox"/> | Letters | | | |
| <input checked="" type="checkbox"/> | Duties/Supp | | | |
| <input type="checkbox"/> | Objections | | | |
| <input type="checkbox"/> | Video Receipt | | | |
| <input checked="" type="checkbox"/> | CI Report | | | |
| <input type="checkbox"/> | 9202 | | | |
| <input checked="" type="checkbox"/> | Order | | | |
| <input type="checkbox"/> | Aff. Posting | | | |
| <input type="checkbox"/> | Status Rpt | | | |
| <input type="checkbox"/> | UCCJEA | | | |
| <input type="checkbox"/> | Citation | | | |
| <input type="checkbox"/> | FTB Notice | | | |
| | | | Reviewed by: skc | |
| | | | Reviewed on: 10/25/16 | |
| | | | Updates: | |
| | | | Recommendation: | |
| | | | File 26- Robledo | |

Petition for Appointment of Temporary Conservator of the Person

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|-------------------------------------|---------------------------|---|
| | | |
| | See petition for details. | NEEDS/PROBLEMS/COMMENTS: |
| | | Court investigator to advise rights, file report. |
| | | 1. Petitioner’s list of relatives at #11 does not specify each person’s relationship to the proposed Conservatee, and it is unclear whether this list includes all relatives within the 2 nd degree, which includes parents, grandparents, siblings, children, and grandchildren. If deceased so state and provide dates of death per Local Rule 7.1.1.D. If there are additional relatives, need notice per §2250(e). |
| | | Reviewed by: skc |
| | | Reviewed on: 10/25/16 |
| | | Updates: |
| | | Recommendation: |
| | | File 27- Coffman |
| <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 | X |
| <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 | |