



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.

1 Charles David Tucker (Estate)

Case No. 0522981

Terry Tucker - Former Executor (pro per)

Attorney: Heather H. Kruthers (for Successor Administrator Public Administrator)

Probate Status Hearing RE: Filing of an Inventory and Appraisal and Filing of a First or Final Account

| | | |
|--|---|--|
| DOD: 3/4/1994 | <p>TERRY TUCKER was appointed as Executor with full IAEA and without bond on 1/17/1995.</p> <p>Letters issued on 1/17/1995.</p> <p>Inventory and Appraisal was due June 1995.</p> <p>Creditor's claim filed on 2/14/1995 by Stephens & Bean Chapel in the amount of \$1,160.11.</p> <p>First account or petition for final distribution was due March 1996.</p> <p>Minute Order dated 1/20/16 states the Court orders Terry Tucker removed as Executor and appoints the Public Administrator. Mr. Tucker reports that the home was lost to foreclosure in 1996, but there are vehicles and a business.</p> <p>Letters for the Public Administrator issued on 4/22/16.</p> <p>Status Report filed on 9/26/16 states at the last hearing on 7/27/16, the Court ordered the PA to determine if the decedent's surviving spouse, Laverne Tucker, was interested in receiving anything from this estate. The PA's office also ordered to determine what happened to the real property, since it appears to have been sold, but the former administrator, Terry Tucker, said it was not.</p> <p>Deputy Public Administrator Scott Stacey states he was able to get the address for Laverne Tucker from Jennifer Tucker, who is the daughter of one of the decedent's three sons, Lanny Tucker. Deputy Public Administrator Stacey states Laverne Tucker lives in a secure senior complex. He went to the complex and rang her room, but she did not answer. He also sent a letter to her address asking that she call him to provide information on how the house on Lind was sold by Terry Tucker.</p> <p style="text-align: center;">Please see additional page</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 10/5/16. Minute order states Counsel is to contact Jill Spaulding.</p> <p>1. Need Inventory and Appraisal and First or Final Account.</p> |
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| Cont. from 042016, 050416, 061516, 072716, 100516 | | |
| Aff.Sub.Wit. | | |
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| Inventory | | |
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| Not.Cred. | | |
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| Objections | | |
| Video Receipt | | |
| CI Report | | |
| 9202 | | |
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| Aff. Posting | | |
| Status Rpt | | |
| UCCJEA | | |
| Citation | | |
| FTB Notice | | |
| | | <p>Reviewed by: KT</p> <p>Reviewed on: 10/25/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1- Tucker</p> |

Status Report filed on 9/26/16 (cont.): Deputy Public Administrator Stacey states he was told by Jennifer Tucker, who met with Laverne the afternoon after the last court appearance, that Laverne wants nothing to do with this case. She wants nothing to do with this family or the estate and just wants to be left alone.

Deputy Public Administrator Stacey states he has contacted Stewart Title several times to locate documents relating to the sale of the real property. They are unable to locate anything, stating that the sale was too long ago. The Court also recommended contacting the law office of deceased attorney David St. Louis. He attempted to do so, but the phone number is out of service.

Attorney Robyn L. Esraelian (for Petitioner Kenneth Lehman, Guardian of the Estate)

Petition for Termination of Guardianship

| | | | | |
|-------------------------------------|---------------|--|---|----|
| | | <p>KENNETH LEHMAN, father and Guardian of the Estate appointed on 11/6/2006, is Petitioner.</p> <p align="center">~Please see Petition for details~</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Page 3 is the related estate of this ward's sibling.</p> | |
| Cont. from | | | | |
| <input type="checkbox"/> | Aff.Sub.Wit. | | | |
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| <input checked="" type="checkbox"/> | Inventory | | | |
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| <input checked="" type="checkbox"/> | Notice of Hrg | | | |
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| | | | Reviewed by: LEG | |
| | | | Reviewed on: 10/25/16 | |
| | | | Updates: | |
| | | | Recommendation: | |
| | | | File 2- R. Lehman | |

Attorney Robyn L. Esraelian (for Petitioner Kenneth Lehman, Guardian of the Estate)

Petition for Termination of Guardianship

| | | | | |
|-------------------------------------|---------------|---|---|----|
| | | <p>KENNETH LEHMAN, father and Guardian of the Estate appointed on 11/6/2006, is Petitioner.</p> <p align="center"><i>~Please see Petition for details~</i></p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Page 2 is the related estate of this ward's sibling.</p> | |
| Cont. from | | | | |
| <input type="checkbox"/> | Aff.Sub.Wit. | | | |
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| | | | Reviewed by: LEG | |
| | | | Reviewed on: 10/25/16 | |
| | | | Updates: | |
| | | | Recommendation: | |
| | | | File 3 - A. Lehman | |

Attorney Kara Schacher, of Paso Robles (for Esperanza S. Boone, former Administrator)

Order to Show Cause Re: Filing of the First Account and/or Petition for Final Distribution

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|-----------------------|--|---------------------------------|
| DOD: 6/15/2012 | <p>ESPERANZA S. BOOKE, sister, was appointed Administrator with Full IAEA authority without bond on 1/9/2013. <i>Letters</i> issued 1/16/2013.</p> <p>Pursuant to Probate Code § 8800(b), <i>Final Inventory and Appraisal</i> was due 5/16/2013.</p> <p>Inventory and Appraisal filed on 8/22/2013 shows an estate value of \$0.00, indicating this is a no-asset estate opened in order to allow the personal representative to proceed with a wrongful death claim on behalf of Decedent's heirs.</p> <p>Pursuant to Probate Code § 12200, first account and/or petition for final distribution was due 1/16/2014.</p> <p>Minute Order dated 8/17/2016 from the previous Status Hearing Re Filing of the First Account and/or Petition for Final Distribution states: The Court vacates the Order to Show Cause as to Kara Schacher. The Court issues an Order to Show Cause to Esperanza Brook as to why she should not be removed as Administrator for her failure to file the first and final account, or a verified status report. Esperanza Brooke is ordered to be personally present in court or present via CourtCall on 9/21/2016.</p> <p>Minute Order dated 9/21/2016 from the previous Status Hearing Re Filing of the First Account and/or Petition for Final Distribution states: No appearances. The Court orders Esperanza S. Boone removed as Administrator of the estate. Kara Schacher is order to be personally present or present via CourtCall on 11/2/2016.</p> <p>Clerk's Certificate of Mailing shows a copy of the Minute Order dated 9/21/2016 was mailed to Esperanza Book and to Attorney Kara Schacher on 9/21/2016.</p> | NEEDS/PROBLEMS/COMMENTS: |
| Cont. from: | | |
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| Verified | | |
| Inventory | | |
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| Not.Cred. | | |
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| Aff. Posting | | |
| Status Rpt | | |
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| FTB Notice | | |
| | | Reviewed by: LEG |
| | | Reviewed on: 10/25/16 |
| | | Updates: |
| | | Recommendation: |
| | | File 5 – Salinas |

Petition for Settlement of Account and Approval of Trustee and Attorney Fees

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|-------------------------------------|---------------|---|--|
| | | H.F. RICK LEAS , Successor Trustee with bond of \$500,000.00, is Petitioner. | NEEDS/PROBLEMS/ COMMENTS: |
| | | Account period: 1/1/15 – 12/31/15 | <p>Minute Order 10/19/16: The \$30 courier fee has been waived and is moot. The Court finds the attorney fees sufficiently itemized. Counsel is to file a declaration by 10/26/16 re any discrepancies between the invoices and the accounting. If the filing sufficiently addresses the issue, the Court may sign the order so that the 11/2/16 hearing can come off calendar.</p> <p>1. Examiner notes previously noted that the trustee's and attorney's services for fees paid during this account period are described in the narrative, but are not itemized by service, only by date and payment amount. Need clarification or further itemization.</p> <p>Declaration of H.F. Rick Leas filed 10/4/16 provides itemized invoices; however, the invoices do not appear to correspond to the payments referenced in the accounting (dates, amounts). Also, no itemization re the attorney fees has yet been provided. Need revised declaration.</p> |
| | | Accounting: \$394,044.69 | |
| | | Beginning POH: \$362,313.75 | |
| | | Ending POH: \$316,927.34 (investment account) | |
| | | Petitioner states the trustee and attorney are entitled to compensation from the trust for their respective services during the account period, and that the following sums that have already been paid are reasonable compensation: | |
| | | Trustee: \$1,692.96 (per Schedule D, for services including care and custody of assets, collection and disbursements of income, periodic review of assets, preparation and filing of fiduciary tax returns, preparation of this petition, and other management and administration, @ \$120/hr as disclosed.) | |
| | | Attorney: \$3,898.56 (per Schedule D, for services including availability, filing account and petition, notifying beneficiaries of hearing) | |
| | | Petitioner requests the Court authorize additional attorney's fees and costs in the amount of \$1,554.50 (\$1,089.50 plus \$435 filing plus \$30 courier), plus any amounts incurred by attorneys for petitioner for the preparation for and appearance at the hearing on this petition, according to proof. See itemization at Exhibit C. | |
| | | <u>SEE ADDITIONAL PAGES</u> | |
| Cont. from 092816, 101916 | | | |
| <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 | |
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| <input type="checkbox"/> | Citation | | |
| <input type="checkbox"/> | FTB Notice | | |
| | | | Reviewed by: skc |
| | | | Reviewed on: 10/25/16 |
| | | | Updates: |
| | | | Recommendation: |
| | | | File 6- Bailey |

Page 2 – Petitioner states this elective account is reasonably necessary for the protection of the interests of both Petitioner and a beneficiary. During the account period, the trustee has made discretionary distributions of principal to Raven Nicole Bailey, and without approval, would be required to hold back substantial funds from distribution to the beneficiaries in order to cover potential costs of litigating any claims made during the approx. three years for the statute of limitations under Probate Code §16460(a) and additional two years under CCP §352.1(a). The trustee seeks timely determination of matters presented herein so that the beneficiaries may receive ongoing and future distributions without lengthy delay.

Petitioner states the present beneficiaries are Brandon Michael Bailey (currently incarcerated) and Raven Nicole Bailey, and Raven Nicole Bailey is the sole residuary beneficiary of the trust and the trust shall terminate 12/7/2020. See petition re other considerations. Raven Nicole Bailey has attained majority; therefore, the GAL previously appointed as terminated by operation of law.

Petitioner requests Order of this Court finding that:

1. All facts stated in the petition are true and all notices required by law have been duly given;
2. The court has received full disclosure regarding the beneficiaries (*summarized, see prayer for full text*);
3. The GAL of Raven Nicole Bailey has terminated by operation of law with no petition necessary upon Raven Nicole Bailey attaining age 18, notice to David Liles and Arlene Liles is no longer necessary;
4. This account and report be settled, allowed and approved, and all acts and transactions of Petitioner set forth in it, or relating to matters set forth in it, be ratified, confirmed, and approved;
5. Petitioner and the attorneys for Petitioner be allowed the requested compensation; and
6. Such other and further orders as the Court may deem just and proper.

Petitioner Christina Williams (Pro Per, mother)

Petition for Visitation

| | | | |
|-------------------------------------|---------------|--|--|
| | | CHRISTINA WILIAMS, mother, is Petitioner. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 9/21/2016. <i>Minute Order</i> states Patricia Ditto [maternal grandmother] serves a copy of the petition on Sharon Robles [Guardian] in open court. Any response is to be properly filed and served. The Court makes no changes to the existing visitation orders today, and admonishes that no other parties are to attend the visits. Patricia Ditto must file her own petition for visitation, instead of Christina Williams petitioning for her.</p> |
| | | ~Please see additional page~ | |
| Cont. from 092116 | | Declaration filed by SHARON ROBLES, Guardian, on 10/24/2016. | |
| <input type="checkbox"/> | Aff.Sub.Wit. | | |
| <input checked="" type="checkbox"/> | Verified | | |
| <input type="checkbox"/> | Inventory | | |
| <input type="checkbox"/> | PTC | | |
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| <input type="checkbox"/> | Notice of Hrg | X | |
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| <input type="checkbox"/> | FTB Notice | | |
| | | | Reviewed by: LEG |
| | | | Reviewed on: 10/25/16 |
| | | | Updates: |
| | | | Recommendation: |
| | | | File 7- Robles |

Probate Status Hearing Re: Filing of the First Account

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|--|---|--|
| | SHELIA STEARNS was appointed Conservator of the Person and Estate with bond of \$50,000.00 and \$425,000.00 to be placed into blocked accounts pursuant to Evidentiary/Settlement Conference Minute Order dated 2/25/14. The Order was signed on 3/5/14. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 9/7/16. Minute order states Counsel represents that the accounting is ready, however his client has not yet provided the facility statements.</p> <ol style="list-style-type: none"> Need First Account 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. Inventory and Appraisal, partial no. 1 filed on 10/28/15 in the amount of \$429,743.51 does not include the attachment 1 showing what was inventoried. |
| Cont. from 102915, 011316, 022416, 042016, 051816, 062216, 080316, 090716, 100516 | On 8/13/14, bond of \$50,000.00 was filed. Thereafter, Letters were issued on 8/25/14. | |
| Aff.Sub.Wit. | | |
| Verified | | |
| Inventory | | |
| PTC | | |
| Not.Cred. | | |
| Notice of Hrg | Order Increasing Bond filed 06/26/15, increased bond to \$373,717.86. | |
| Aff.Mail | Bond of \$373,718.00 filed 09/08/15. | |
| Aff.Pub. | Inventory & Appraisal, partial no. 1, filed 10/28/15 - \$429,743.51 | |
| Sp.Ntc. | | |
| Pers.Serv. | Inventory & Appraisal, partial no. 2-Final filed 7/13/16 - \$684,950.00 | |
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| | | Reviewed by: KT |
| | | Reviewed on: 10/25/16 |
| | | Updates: |
| | | Recommendation: |
| | | File 8 – Cook |

Probate Status Hearing RE: Filing of the First Account

| | | | |
|----------------------------------|---|--|---|
| | | <p>MOISES RUSSELL RUIZ, son, was appointed conservator of the person and estate on 6/3/2015 with bond of \$146,300.</p> <p>Letters issued 6/9/2015.</p> <p>Final I&A was filed 12/10/2015 showing an estate value of \$302,387.90.</p> <p>Minute order dated 6/3/2016 set status hearing for filing the first account.</p> <p>Minute order dated 9/7/2016 stated counsel represents the Conservatee is now deceased, so he is now working on the two part accounting. Matter was continued to 10/5/2016.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 10/5/2016. Counsel requests 30 days.</p> <p>As of 10/25/2016, no new documents filed and the following issues still exist:</p> <ol style="list-style-type: none"> Need accounting 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>Reviewed by: SEF</p> |
| | | | <p>Reviewed on: 10/25/2016</p> |
| | | | <p>Updates:</p> |
| | | | <p>Recommendation:</p> |
| | | | <p>File 12- Ruiz</p> |
| Cont. from 090716, 100516 | | | |
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Probate Status Hearing Re: Filing First Account/Final Distribution

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| DOD: 4/26/11 | <p>CAROLYN M. FURHMANN was appointed Executor without bond and with full IAEA authority on 9/3/15.</p> <p>Letters issued on 9/4/15.</p> <p>Inventory and Appraisal showing the estate valued at \$152,000.00 was filed on 10/13/16.</p> <p>Minute order dated 9/3/15 set this status hearing for the filing of the first account and/or petition for final distribution.</p> <p>Status Report filed on 10/21/16 states Petitioner is exploring what is believed to be an outstanding note receivable. Once the status of the note is confirmed, Petitioner will file a supplementary inventory and appraisal if needed.</p> <p>Decedent's son, Ronald Zinders, survived him, but passed way prior to the establishment of his father's estate. Petitioner is working with Ronald's heirs to determine the most effective way to distribute his estate share.</p> <p>The estate is not in a condition to close.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>3. Need First Account and/or Petition for Distribution.</p> |
| Cont. from | | |
| Aff.Sub.Wit. | | |
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| Inventory | | |
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| Not.Cred. | | |
| Notice of Hrg | | |
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| | | Reviewed by: KT |
| | | Reviewed on: 10/25/16 |
| | | Updates: |
| | | Recommendation: |
| | | File 13- Zindars |

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

| | | |
|---------------|--|---|
| DOD: 8/14/14 | BEVERLY H. LEACH, spouse, was appointed Executor with full IAEA and without bond on 09/01/15. | NEEDS/PROBLEMS/COMMENTS: |
| | | |
| | Letters issued on 9/11/15. | <p>Note: Kenton J. Klassen substituted in as attorney of record for Thomas L. McCormick on 9/30/16.</p> |
| | | |
| Cont. from | Inventory and appraisal showing the estate valued at \$254,821.04 was filed on 2/19/16. | <p>4. Need First Account and/or Petition for 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> |
| Aff.Sub.Wit. | | |
| Verified | <p>Minute order dated 9/1/15 set this status hearing for the filing of the first account and/or petition for final distribution.</p> | |
| Inventory | | |
| PTC | <p>Minute order dated 3/30/16 for Order to Show Cause for Failure to File the Inventory and Appraisal, states the parties are reminded of the 11/2/16 hearing for the filing of the closing petition; Ms. Leach is to be present in court or via CourtCall on that date if the petition has not been field.</p> | |
| Not.Cred. | | |
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| FTB Notice | | |
| | | Reviewed by: KT |
| | | Reviewed on: 10/25/16 |
| | | Updates: |
| | | Recommendation: |
| | | File 14- Leach |

Probate Status Hearing RE: Filing of the First Account and/or Petition for Final Distribution.

| | | |
|----------------------|---|--|
| DOD: 4/3/15 | <p>LINDA MCCLOUD was appointed as Administrator with Will Annexed, with full IAEA and bond set at \$1,883,274.00 on 10/6/15.</p> <p>Bond filed on 10/22/15.</p> <p>Letters issued on 10/22/15.</p> <p>Inventory and appraisal showing the estate valued at \$1,412,217.24 filed on 2/9/16.</p> <p>Minute order dated 10/6/15 set this status hearing for the filing of the First Account and/or Petition for Final Distribution.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>5. Need First Account and/or Petition for 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 | | |
| Aff.Sub.Wit. | | |
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| Inventory | | |
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| Notice of Hrg | | |
| Aff.Mail | | |
| Aff.Pub. | | |
| Sp.Ntc. | | |
| Pers.Serv. | | |
| Conf. Screen | | |
| Letters | | |
| Duties/Supp | | |
| Objections | | |
| Video Receipt | | |
| CI Report | | |
| 9202 | | |
| Order | | |
| Aff. Posting | | |
| Status Rpt | | |
| UCCJEA | | |
| Citation | | |
| FTB Notice | | |
| | | Reviewed by: KT |
| | | Reviewed on: 10/25/16 |
| | | Updates: |
| | | Recommendation: |
| | | File 15- McCloud |

Attorney Edward R. Ramirez (for Petitioner Giuliano DiCicco, Executor)

First and Final Account of Administrator and Petition for Its Settlement, for Allowance of Compensation for Ordinary and Extraordinary Services for Administrator and Attorney and for Final Distribution

| | | |
|--|--|--|
| DOD: 7/15/2015 | GIULIANO DICICCO , son-in-law and Executor, is Petitioner. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. <i>Petition</i> does not state the account period pursuant to Probate Code § 1061(a).</p> <p>2. <i>Petition</i> does not include itemization of the expenses paid to support the request for reimbursement of expenses advanced by the Executor of \$13,515.45. Need declaration containing an itemization of expenses paid by the Executor in the sum of \$13,515.45.</p> <p>~Please see additional page~</p> |
| | | |
| | | |
| | | |
| Cont. from | Account period: [Not specified] | |
| <input type="checkbox"/> Aff.Sub.Wit. | Accounting - \$291,015.45 | |
| <input checked="" type="checkbox"/> Verified | Beginning POH - \$277,500.00 | |
| <input checked="" type="checkbox"/> Inventory | Ending POH - \$ 70,686.88 <i>(\$68,186.88 is cash)</i> | |
| <input checked="" type="checkbox"/> PTC | Executor - \$8,550.00 <i>(statutory)</i> | |
| <input checked="" type="checkbox"/> Not.Cred. | Executor X/O - \$1,000.00 <i>(per Local Rule for sale of real property)</i> | |
| <input checked="" type="checkbox"/> Notice of Hrg | Executor Expenses - \$13,515.45 (Need itemization) | |
| <input checked="" type="checkbox"/> Aff.Mail <small>W/O</small> | Attorney - \$8,550.00 <i>(statutory)</i> | |
| <input type="checkbox"/> Aff.Pub. | Attorney X/O - \$1,000.00 <i>(per Local Rule for court-confirmed sale of real property)</i> | |
| <input type="checkbox"/> Sp.Ntc. | | |
| <input type="checkbox"/> Pers.Serv. | | |
| <input type="checkbox"/> Conf. Screen | | |
| <input type="checkbox"/> Letters <small>110215</small> | | |
| <input type="checkbox"/> Duties/Supp | Creditors' Claims - \$784.62 <i>(to be paid to Crystal Pool Service @ \$552.62; and to Acute Pest Control @ \$232.00;)</i> | |
| <input type="checkbox"/> Objections | | |
| <input type="checkbox"/> Video Receipt | | |
| <input type="checkbox"/> CI Report | Distribution pursuant to Decedent's Will is to: | |
| <input checked="" type="checkbox"/> 9202 | <ul style="list-style-type: none"> • NINON NICHOLAS STAMOULIS TURNER – \$100.00 cash; • TERESA YRIBARREN – Lincoln Towncar and \$1,000.00 cash; • EVANGELIA NIKKI STAMOULIS DiCICCO – \$33,686.81 cash; • <i>[distribution to GIULIANO DiCICCO should be omitted].</i> | |
| <input checked="" type="checkbox"/> Order | | |
| <input type="checkbox"/> Aff. Posting | | |
| <input type="checkbox"/> Status Rpt | | |
| <input type="checkbox"/> UCCJEA | | |
| <input type="checkbox"/> Citation | | |
| <input checked="" type="checkbox"/> FTB Notice | | |

Reviewed by: LEG

Reviewed on: 10/26/16

Updates:

Recommendation:

File 16- Stamoulis

NEEDS/PROBLEMS/COMMENTS, continued:

3. *Petition* requests but paragraph 14 of the proposed order does not include payment to specified creditors from the estate. Need revised proposed order that provides for payment to the specified creditors as consistent with the request in the *Petition*. (Additionally, caption of proposed order contains an extra word that should be removed.)
4. *Petition* requests and the proposed order includes distribution of personal property items consisting of oil portraits which were not inventoried and appraised as estate assets, and are therefore inappropriately included as assets to be distributed from the estate. Need revised proposed order for distribution of only the estate assets that were inventoried and appraised.

17A

Clarence Jesse Bennett (Estate)

Case No. 15CEPR00816

Attorney
Attorney
Attorney
Attorney

Janet L. Wright (for Petitioner Juanita Bennett, spouse)
William J. Keeler, of Portland, Oregon (also for Petitioner Juanita Bennett, spouse)
Kurt F. Vote; Scott D. Laird; Dylan J. Crobby, for Objector G. Dana French, Personal Representative of the Estate of Clarence Jesse Bennett)
B. Howard Pearson, of Stanford (for Board of Trustees of Leland Stanford Jr. University, Remainder Beneficiary of the C.J. Bennett Family Trust of 1987)

Petition for Payment of Family Allowance

| | | | |
|-------------------------------------|---------------|--|--|
| DOD: 6/26/2015 | | JUANITA BENNETT, surviving spouse, is Petitioner. | NEEDS/PROBLEMS/COMMENTS: <u>Page 9B</u> is a Probate Status Hearing Re: Setting of a Contested Hearing. <u>Continued from 8/31/2016.</u> Note: Probate Status Hearing for filing of the first and/or final account is set on <u>11/30/2016.</u> |
| | | ~Please see Petition for details~ | |
| | | Amendment to Petition for Payment of Family Allowance filed 5/11/2016. | |
| Cont. from 052516, 083116 | | Verified Objection to Petition for Payment of Family Allowance filed by Respondent, the Estate of Clarence J. "Peter" Bennett, by and through its Personal Representative G. Dana French on 5/13/2016. | |
| <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 | Request for Judicial Notice in Support of Verified Objection to Petition for Payment of Family Allowance filed 5/13/2016. | |
| <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 checked="" type="checkbox"/> | Objections | Verified Objection to Amendment to Petition for Payment of Family Allowance filed by Respondent, the Estate of Clarence J. "Peter" Bennett, by and through its Personal Representative G. Dana French on 5/20/2016. | |
| <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 17A- Bennett | |

17A

Attorney Janet L. Wright (for Petitioner Juanita Bennett, spouse)
 Attorney William J. Keeler, of Portland, Oregon (also for Petitioner Juanita Bennett, spouse)
 Attorney Kurt F. Vote; Scott D. Laird; Dylan J. Crobey (for Objector G. Dana French, Personal Representative of the Estate of Clarence Jesse Bennett)
 Attorney B. Howard Pearson, of Stanford (for Board of Trustees of Leland Stanford Jr. University, Remainder Beneficiary of the C.J. Bennett Family Trust of 1987)

Probate Status Hearing Re: Setting of a Contested Hearing

| | | |
|--------------------------|--|---|
| DOD: 6/26/2015 | JUANITA BENNETT , surviving spouse filed a <i>Petition for Payment of Family Allowance</i> on 4/12/2016, with an <i>Amendment to Petition</i> filed 5/11/2016. | NEEDS/PROBLEMS/COMMENTS: <u>Continued from 8/31/2016.</u> The following issue from the last hearing remains: 1. Need verified status report from counsel for the opposing parties, and proof of service of notice of the status hearing pursuant to Local Rule 7.5(B), which provides that in all matters set for Status Hearing, a verified Status Report must be filed no later than 10 days before the hearing; notice of the status hearing with a copy of the Status Report shall be served on all necessary parties. |
| Cont. from 083116 | G. DANA FRENCH , Executor of the Estate, filed a <i>Verified Objection to Petition for Payment of Family Allowance</i> on 5/13/2015, and a <i>Verified Objection to Amendment to Petition</i> on 5/20/2016. | |
| 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 | X | |
| UCCJEA | | |
| Citation | | |
| FTB Notice | | |
| | | Reviewed by: LEG Reviewed on: 10/25/16 Updates: Recommendation: File 17B- Bennett |

Probate Status Hearing RE: Filing of the Inventory and Appraisal

| | | | |
|-----------------------|---|--|---|
| DOD: 3/31/2016 | <p>KELLEY YOUNGS, daughter, was appointed Administrator with full IAEA without bond.</p> <p><i>Letters issued 6/2/2016.</i></p> <p>Minute order dated 6/1/2016 set this status hearing re: the filing of the inventory and appraisal.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need inventory and appraisal or current written status report pursuant to Local Rule 7.5, which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the status report shall be served on all necessary parties.</p> | |
| Cont. from | | | |
| Aff.Sub.Wit. | | | |
| Verified | | | |
| Inventory | | | x |
| PTC | | | |
| Not.Cred. | | | |
| Notice of Hrg | | | |
| Aff.Mail | | | |
| Aff.Pub. | | | |
| Sp.Ntc. | | | |
| Pers.Serv. | | | |
| Conf. Screen | | | |
| Letters | | | |
| Duties/Supp | | | |
| Objections | | | |
| Video Receipt | | | |
| CI Report | | | |
| 9202 | | | |
| Order | | | |
| Aff. Posting | | | |
| Status Rpt | x | | |
| UCCJEA | | | |
| Citation | | | |
| FTB Notice | | | |
| | | Reviewed by: SEF | |
| | | Reviewed on: 10;/25/2016 | |
| | | Updates: | |
| | | Recommendation: | |
| | | File 18- McCrystyn | |

Petitioner: Berta Isabel Ochoa Castro (Pro per – Mother)

Petition for Visitation

| | | | | |
|-------------------------------------|---------------|--|--|---|
| | | BERTA ISABEL OCHOA CASTRO, mother, is petitioner | NEEDS/PROBLEMS/COMMENTS: | |
| | | | | |
| | | JOSEFINA CASTRO MENDOZA and BENITO MENDOZA, maternal grandmother and step-grandfather were appointed co-guardians on 9/6/2016. | 1. Need <i>Notice of Hearing</i> . 2. Need proof of service at least 15 days before the hearing of the <i>Notice of Hearing</i> on: a. Josefina Castro Mendoza (guardian) b. Benito Mendoza (guardian) c. Jesse Ochoa (father) | |
| | | | | |
| Cont. from | | Father: JESSE OCHOA – | | |
| <input type="checkbox"/> | Aff.Sub.Wit. | | | |
| <input checked="" type="checkbox"/> | Verified | <i>Please see petition for details.</i> | | |
| <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 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: SEF | |
| | | | Reviewed on: 10/26/2016 | |
| | | | Updates: | |
| | | | Recommendation: | |
| | | | File 20- Ochoa | |

Probate Status Hearing RE: Proof of Bond

| | | | |
|---------------|--|-----------------------|--------------------------|
| Age: | | | NEEDS/PROBLEMS/COMMENTS: |
| DOD: | | | |
| | | | |
| | | | |
| Cont. from | | | |
| Aff.Sub.Wit. | | | |
| Verified | | | |
| Inventory | | | |
| PTC | | | |
| Not.Cred. | | | |
| Notice of Hrg | | | |
| Aff.Mail | | | |
| Aff.Pub. | | | |
| Sp.Ntc. | | | |
| Pers.Serv. | | | |
| Conf. Screen | | | |
| Letters | | | |
| Duties/Supp | | | |
| Objections | | | |
| Video Receipt | | | |
| CI Report | | | |
| 9202 | | | |
| Order | | | |
| Aff. Posting | | | |
| Status Rpt | | | |
| UCCJEA | | | |
| Citation | | | |
| FTB Notice | | | |
| | | Reviewed by: skc | |
| | | Reviewed on: 10/26/16 | |
| | | Updates: | |
| | | Recommendation: | |
| | | File 22- Green | |

Petition for Appointment of Guardian of the Person

| | | |
|---|---|---|
| | <u>NO TEMPORARY REQUESTED</u> | NEEDS/PROBLEMS/COMMENTS: |
| | KIMIKA DELONEY, paternal grandmother, is petitioner | <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of personal service at least 15 days before the hearing of the <i>Notice of Hearing</i> <u>or</u> consents and waivers of notice <u>or</u> declarations of due diligence for: <ol style="list-style-type: none"> a. Donald R. Phelps (father) b. Rachel Morris (mother) 3. Need proof of service at least 15 days before the hearing of the <i>Notice of Hearing</i> <u>or</u> consents and waivers of notice <u>or</u> declarations of due diligence for: <ol style="list-style-type: none"> a. Donald Phelps Sr. (paternal grandfather) b. Cecil Morris (maternal grandfather) c. Maternal grandmother |
| | <i>Please see petition for details.</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. | x | |
| <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 checked="" type="checkbox"/> CI Report | | |
| <input type="checkbox"/> 9202 | | |
| <input checked="" type="checkbox"/> Order | | |
| <input type="checkbox"/> Aff. Posting | | |
| <input type="checkbox"/> Status Rpt | | |
| <input checked="" type="checkbox"/> UCCJEA | | |
| <input type="checkbox"/> Citation | | |
| <input type="checkbox"/> FTB Notice | | |
| | | Reviewed by: SEF |
| | | Reviewed on: 10/26/2016 |
| | | Updates: |
| | | Recommendation: |
| | | File 23- Phelps |

Petitioner

Bamping, Brian Clayton (Pro Per – Paternal Great – Uncle – Petitioner)

Petitioner

Bamping, Tina Marie (Pro Per – Paternal – Great-Aunt – Petitioner)

Petition for Appointment of Guardian of the Person

| | | | |
|---------------------------|---------------|---|---|
| See petition for details. | | | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. If diligence is not found, need notice to maternal grandparents pursuant to Probate Code §1511 or further diligence.</p> |
| | 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: 10/26/16 |
| | | | Updates: |
| | | | Recommendation: |
| | | | File 24- Wright |

Petition for Appointment of Guardian of the Person a

| | | | | |
|---|---------------|---------------------------|---|--|
| | | See petition for details. | NEEDS/PROBLEMS/COMMENTS: 2. If diligence is not found, need notice to both fathers and paternal grandparents pursuant to Probate Code §1511 or further diligence. | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | 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 | | | |
| ✓ | Clearances | | | |
| | Order | | | |
| | Aff. Posting | | | |
| | Status Rpt | | | |
| ✓ | UCCJEA | | | |
| | Citation | | | |
| | FTB Notice | | | |
| | | | Reviewed by: skc | |
| | | | Reviewed on: 10/26/16 | |
| | | | Updates: | |
| | | | Recommendation: | |
| | | | File 25- Edwards & Hannah | |

Petition to Determine Succession to Real Property

| | | | |
|---------------------|----------------------|---|--|
| DOD: 3/21/16 | | <p>AMELIA GUTIERREZ, Spouse, along with SAM GUTIERREZ, MONIKA PETRILLE, and RANDALL GUTIERREZ, adult children, are Petitioners.</p> <p>40 days since DOD</p> <p>No other proceedings</p> <p>I&A: \$87,000.00 (An undivided 60% interest in real property in Sanger)</p> <p>Decedent died intestate</p> <p>Petitioners request Court determination that the decedent's 60% interest in the Sanger real property passes to them as follows:</p> <p>Amelia Gutierrez: A 20% interest in the decedent's 60% interest</p> <p>Sam Gutierrez: A 13.33% interest in the decedent's 60% interest</p> <p>Monika Petrille: A 13.34% interest in the decedent's 60% interest</p> <p>Randall Gutierrez: A 13.33% interest in the decedent's 60% interest</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> |
| | | | |
| | | | |
| | | | |
| | 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: skc</p> <p>Reviewed on: 10/26/16</p> <p>Updates:</p> <p>Recommendation: SUBMITTED</p> <p>File 26- Gutierrez</p> | |

Petition for Probate of Will and for letters Testamentary; Authorization to Administer Under the IAEA

| | | | |
|-------------------------------------|----------------------|---|--|
| DOD: 4/16/15 | | <p>NANCY RAMOS, Named Executor without bond, is Petitioner.</p> <p>Full IAEA – ok</p> <p>Will dated 4/9/13</p> <p>Residence: Fresno Publication: Business Journal</p> <p>Estimated value of estate: Annual income from real property: \$21,000.00</p> <p>Probate Referee: Rick Smith</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Petitioner does not include herself in the list at #8, which should set forth her relationship to the decedent and address. Need declaration setting forth this information.</p> <p><u>Note:</u> If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> • Wednesday, April 5, 2017 for filing the Inventory and Appraisal • Wednesday, January 3, 2018 for filing the first or final account |
| S/P | 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: skc</p> | | | |
| <p>Reviewed on: 10/26/16</p> | | | |
| <p>Updates:</p> | | | |
| <p>Recommendation:</p> | | | |
| <p>File 27- Marple</p> | | | |