



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>
Cont. from 042016, 050416, 061516, 072716, 100516		
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: 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.			
<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			
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<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: 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><u>Page 2</u> is the related estate of this ward's sibling.</p>	
Cont. from				
<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.			
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<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: 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

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:			
Aff.Sub.Wit.			
Verified			
Inventory			
Account			X
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: LEG	
		Reviewed on: 10/25/16	
		Updates:	
		Recommendation:	
		File 5 – Salinas	

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

		NEEDS/PROBLEMS/ COMMENTS:	
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
<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		
		<u>OFF CALENDAR</u>	
		Order signed 10/27/16	
		Reviewed by: skc	
		Reviewed on: 10/25/16	
		Updates: 10/27/16	
		Recommendation:	
		File 6- Bailey	

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		
<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 checked="" 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	X	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 10/25/16
			Updates:
			Recommendation:
			File 7- Robles

Probate Status Hearing Re: Filing of the First Account

	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	
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 8 – Cook

Page 2 – Petitioner states he began the job of cleaning the house and yard, and his wife helped as well. Due to the conservatee's insistence that his funds not be used to hire any help, Petitioner and his wife did the cleanup work themselves. After several weeks, the home was safe, clean, and livable again. Thereafter, Petitioner began cleaning the yard and outbuildings. He installed security cameras at the Conservatee's request. The Conservatee was concerned about theft, but would not hire a professional company to do the installation.

Petitioner provided other services to the Conservatee with his wife's assistance including shopping, cooking cleaning, maintaining the yard and outbuildings. He and his wife paid for all groceries and household supplies and treated the Conservatee to frequent outings. Petitioner provided daily care for the Conservatee including managing his diabetes medications and diet as directed by his doctor. Under Petitioner's care, the Conservatee was able to reduce and eventually eliminate his need for diabetes medication. Petitioner also helped Conservatee with various projects around the property. The Conservatee was unable to drive, so Petitioner and his wife provided all transportation.

Shortly after moving in, Petitioner began the process of obtaining conservatorship, which process the Conservatee resisted, and there were some disagreements with Petitioner's brother as well. Eventually they agreed to serve as co-conservators; however, the Conservatee retained the right to make medical decisions for himself.

Along with getting the house and grounds in order, Petitioner also had to sort through the huge amount of mail that had accumulated, and assist with regular payment of bills. In the process, Petitioner began to understand that the Conservatee had been transferring assets out of his personal trust, failing to collect rent from his commercial tenant, and hoarding large amounts of cash in the house. He also discovered a recent spate of extremely risky investments. Petitioner was able to prevent foreclosure of the Conservatee's home when he discovered that payments had been neglected on a time share that he had purchased without telling anyone.

Petitioner states when Conservatee realized that Petitioner had become aware of his recent investments and was concerned that he was being taken advantage of by scams or unscrupulous investment advisors, the Conservatee became secretive about his financial dealings. He insisted he knew what he was doing and did not need help making such decisions.

Petitioner retained Attorney Catherine A. Amador in December 2014 to seek appointment as conservator of his father's estate, which the Conservatee resisted vigorously. The problem was temporarily resolved when the Conservatee himself appointed Professional Fiduciary Bruce Bickel as successor trustee of his trust and indicated his intention to allow Mr. Bickel to manage his personal finances. Unfortunately, he failed to cooperate with Mr. Bickel. As the summer of 2015 progressed, it became increasingly clear that the Conservatee was no longer able to manage his own health care properly. He switched physicians because he was determined to regain his driver's license. He refused to allow Petitioner to talk with his new doctor, making it difficult to ensure that he was following his medication regime. Therefore, Petitioner filed a petition for exclusive authority to make medical decisions for him on 9/17/15.

SEE ADDITIONAL PAGES

Page 3 – Petitioner states at this time, strong disagreement developed between Petitioner and his brother, co-conservator Bradley Snavely, regarding the level of care the Conservatee needed. This inflamed the conservatee's own frustration with the situation and he became less and less willing to cooperate with Petitioner and his wife. In addition, the Conservatee became obsessed with the desire to drive again and have control over all of his vehicles. On one occasion, he drove into town and only stopped when he ran out of gas. A neighbor alerted Petitioner to the situation. Petitioner tried to keep the keys locked away, but the Conservatee had at least one vehicle and his shop re-keyed and then refused to give Petitioner the new keys. Petitioner had to monitor more closely thereafter to ensure he did not drive and that he was working safely in his shop, due to the Conservatee hiding from Petitioner.

Petitioner was also negotiating with his brother to reach common ground to move forward to provide care. Unfortunately, they had vastly different opinions.

Concurrently, Mr. Bickel was becoming increasingly convinced that he could not successfully serve as trustee and conservator of the estate because the Conservatee was not cooperating with him. The parties agreed it was best that all current conservators resign and the Public Guardian be appointed as conservator of the person and estate and as trustee of the conservatee's personal trust.

At hearing on 10/28/15, the Court agreed, accepted the resignations, and appointed the Public Guardian as conservator of the person and estate, with medical consent powers.

Mr. Bickel filed a partial inventory on 11/18/15 and a second partial inventory on 1/11/16. He and the PG cooperated with management of the conservatee's assets thereafter as it remained necessary for him to present a formal petition to be removed from the trust. They agreed that the end date for his account on the conservatorship would be 1/12/16, at which time he had completed transfer of all conservatorship accounts and assets to the PG. The Court accepted this plan.

On 6/14/16, Mr. Bickel filed his first and Final Accounts within the conservatorship and trust matters, and at status hearing on 6/15/16, confirmed to the court that he had inventoried all assets he had been able to marshal and was not aware of additional conservatorship estate assets. However, the PG has yet to file its own inventory following Mr. Bickel's surrender of assets he had marshalled for both estate and trust.

Thereafter, Petitioner and his attorney spent additional time assisting the PG by providing information re the conservatee's home, caregivers, personal needs and habits, and medical condition.

Petitioner asserts that \$12/hr is a reasonable hourly rate for his time spent caring for the Conservatee including personal care, maintenance of the large home and grounds, and transportation. Petitioner did not anticipate the need to do this, as the agreement with his father and his brother at the time he moved to Caruthers was that he would be given the lease of the Conservatee's almond orchard. Thus, he expected to have income from farming the orchard in exchange for providing full-time care for the Conservatee. However, the Conservatee refused to allow Petitioner to have the lease, due to his frustration that others were exerting control over his life, and he focused his frustration on Petitioner and his wife, eventually becoming physically violent towards Betsy.

SEE ADDITIONAL PAGES

Page 4 – Petitioner states ultimately the situation became untenable and decision was made to appoint the Public Guardian and change to paid caregivers.

As an alternative, Petitioner believes a fair estimate of the total time he spent providing services to the Conservatee can be derived from the number of hours of caregiver time the PG determined was necessary at Petitioner's resignation and replacement caregivers were hired, which was a minimum of 8 hours per day to ensure 3 healthy meals, assistance with medication, transportation, etc. The cost for Comfort Keepers was over \$4,500/month to provide this level of care, and this did not include groceries and household supplies, housekeeping, yard maintenance.

By comparison, Petitioner worked 15 hours/day immediately after he moved in with the Conservatee, cleaning the property and addressing the financial situation. Thereafter, the conservatee's personal care needs decreased, but gradually increased as time went by. Petitioner continued to care for the large yard and maintain the house, provide transportation, etc. Petitioner asserts that on average, he provided 8 hours of care per day to the Conservatee.

Petitioner and his wife provided care for 20 months from 1/1/14 – 9/30/15. During that time, they took five weeks of vacation. Petitioner's brother also provided an additional 5 days of respite care. Petitioner calculates fees as follows:

1/1/14 – 9/30/15 is 608 days, reduced for vacation, etc., is 568 days.
568 days x 8 hours/day = 4,544 hours
4,544 hours @ \$12/hr = \$54,528.

This amounts to \$2,726.40/month, and includes expense of groceries, household supplies, housekeeping, yard work, maintenance, transportation, and does not include Betsy's time.

Petitioner states he has incurred \$14,889 in attorney's fees including time to prepare this petition, and \$1,014 in allowable costs. He anticipates incurring an additional 1.5 hours for appearance and \$435 for the filing fee. (See Declaration of Catherine A. Amador in Support of Petition for Attorney's Fees and Costs for itemization.)

Petitioner requests the Court approve this petition and direct payment of \$54,528 to Petitioner and \$16,315.50 to Pascuzzi, Pascuzzi & Stoker, either from the Conservatorship or from the Conservatee's trust, and such further orders as it deems necessary and proper.

Objections filed 10/25/16 by Public Guardian, current conservator, state nowhere in the petition does Petitioner account for the fact that he lived with his father rent-free. In fact, he and his wife sold their home, so they did not have a mortgage of their own to pay. The PG requests that the Court consider the lack of rent paid when determining the fees of Bryan Snavely should he be paid.

Second and Final Report of Administration, petition for Mileage Reimbursement, Reimbursement of Cash Advances, for Statutory and Extraordinary Commissions and Fees to Executor and Attorney and for Final Distribution.

DOD: 7/14/14		RAYE GRANT , Executor, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 12/16/15 – 9/1/16	
		Accounting - \$203,179.60	
Cont. from 101916		Beginning POH - \$114,660.43	
<input type="checkbox"/>	Aff.Sub.Wit.	Ending POH - \$ 73,143.32	
<input checked="" type="checkbox"/>	Verified	Executor (statutory) - \$4,161.87	
<input checked="" type="checkbox"/>	Inventory	Executor x/o - \$396.00 (mileage for sale of real property 720 miles @ \$.55 per mile)	
<input checked="" type="checkbox"/>	PTC	Executor Reimbursement - \$21,336.86 (for personal funds used in the administration of the estate prior to the sale of the real property.)	
<input checked="" type="checkbox"/>	Not.Cred.	Attorney (statutory) - \$4,161.87	
<input checked="" type="checkbox"/>	Notice of Hrg	Attorney x/o - \$2,700.00 (sale of real property, per itemization 13.5 hrs @ \$200 per hour.)	
<input checked="" type="checkbox"/>	Aff.Mail	Closing reserve - \$5,000.00	
	W/		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
	10/16/14		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	9202	Russell Reed - \$7,077.34	
<input checked="" type="checkbox"/>	Order	Robyn Dunn - \$3,538.68	
	Aff. Posting	Diane Tompkins - \$7,077.34	
	Status Rpt	Austin Rowley - \$7,077.34	
	UCCJEA	April Bezona - \$1,769.34	
	Citation	Adam Richardson - \$1,769.34	
<input checked="" type="checkbox"/>	FTB Notice	Sierra View Church - \$7,077.34	
			Note: Pursuant to Local Rule 7/12/6 the Court will set a Status Hearing as follows:
			<ul style="list-style-type: none"> Wednesday, May 24, 2017 at 9:00 a.m. in Dept. 303 for an Informal Accounting of the \$5,000.00 Closing Reserve.
			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. Filing of the informal accounting of closing reserve will not generate a new hearing date.
			Proposed distribution, pursuant to Decedent's Will, is to:
			Reviewed by: KT
			Reviewed on: 10/25/16
			Updates:
			Recommendation:
			File 10- Rowley

11 Mildred Frances Hicks (Estate)

Case No. 15CEPR00196

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

Attorney: Gary Winter (for Objectors Derek Hicks, Helen Hicks and Lelon Hicks)

First and Final Account and Report of Administrator and Petition for Allowance of Ordinary and Extraordinary Commissions and Fees; for Instruction Regarding Payment of Claims and for Distribution.

DOD: 9/22/12	PUBLIC ADMINISTRATOR , Administrator, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Gary Winter filed a creditor's claim for fees in his representation of Derek Hicks, Helen Hicks and Lelon Hicks in the amount of \$6,467.74. There does not appear to be any provision in the Probate Code for the filing of a creditor's claim against the beneficiaries in an estate. Creditor's Claim of Gary Winters for payment of attorney fees for his clients, Derek Hicks, Helen Hicks and Lelon Hicks is \$6,467.74. Petition includes payment of attorney fees to Gary Winter on behalf of Derek Hicks, Helen Hicks and Lelon Hicks in the amount of \$11,722.70 and in the order totals \$13,122.71. Need Clarification. Petition states Derek Hicks, Helen Hicks and Lelon Hicks have agreed that Mr. Winter's fees can be paid from their share of the estate. However said agreements have not been filed.
	Account period: 5/19/15 – 8/13/16	
Cont. from	Accounting - \$120,000.00	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$120,000.00	
<input checked="" type="checkbox"/> Verified	Ending POH - \$103,984.90	
<input checked="" type="checkbox"/> Inventory	Attorney (statutory) - \$4,600.00	
<input checked="" type="checkbox"/> PTC	Attorney x/o - \$1,000.00	
<input checked="" type="checkbox"/> Not.Cred.	(for sale of real property)	
<input checked="" type="checkbox"/> Notice of Hrg	Administrator (statutory) - \$4,600.00	
<input checked="" type="checkbox"/> Aff.Mail	Administrator x/o - \$1,248.00	
<input type="checkbox"/> Aff.Pub.	(sale of real property and taxes)	
<input type="checkbox"/> Sp.Ntc.	Lawvex (Gary Winter)- ????	
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	Bond fee - \$375.00	
<input checked="" type="checkbox"/> Letters 11/16/15	(o.k.)	
<input type="checkbox"/> Duties/Supp	Costs - \$546.00	
<input checked="" type="checkbox"/> Objections	(filing fees, certified copies)	
<input type="checkbox"/> Video Receipt	Closing - \$2,000.00	
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 9202	Please see additional page	
<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		
		Please see additional page
		Reviewed by: KT
		Reviewed on: 10/25/16
		Updates: 10/27/16
		Recommendation:
		File 11- Hicks

4. Petition states David Hicks has made a claim through his attorney Lisa Horton for reimbursement of \$21,647.45. Ms. Kruthers told Ms. Horton and Mr. Winter that she will advise the PA to reimburse David Hicks $\frac{3}{4}$ of what he paid for the following expenses 1) property insurance, 2) recording fees/costs, 3) property taxes and 4) estate administration fees. The attorneys understand that the PA is seeking the Court's instructions as to the other amounts to be reimbursed to Mr. Hicks. It appears that Mr. Hicks should be reimbursed 100% of the costs allowed by the court.
5. Petition states the original petition for probate listed Norchelle Hicks as a daughter. However, through a review of legal documents, the PA determined that Norchelle was never adopted by the decedent, but rather was given the care and custody of her. Petition alleges Norchelle will be given notice of the account and petition. No proof of service has been filed showing Norchelle has been noticed of this hearing.

The initial petitioner in this matter was David Hicks, represented by Lisa Horton.

A competing petition was filed by Derek Hicks, Helen Hicks and Lelon Hicks, represented by Gary Winters.

The Court found the dispute between the parties was so severe that neither could be appointed and therefore appointed the Public Administrator.

Proposed distribution pursuant to intestate succession is to:

Derek Hicks $\frac{1}{4}$

Lelon Hicks $\frac{1}{4}$

Helen Hicks $\frac{1}{4}$

David Hicks $\frac{1}{4}$

Objections to First and Final Account and Report of Administrator Re: Reimbursements filed by Derek Hicks, Helen Hicks and Lelon Hicks on 10/25/16 states they have no objections to the Administrator's position to pay $\frac{3}{4}$ of the costs for property insurance, recording fees/costs, property taxes and estate administration fees. Objectors do object to the remaining reimbursements requested.

Objectors object to requests for reimbursements prior to May 19, 2015 as inappropriate acts of an individual who was either in possession of estate property when those expenses were incurred or received the benefit of that possession himself by renting the Estate property to others.

Objectors object to requests for reimbursement after May 19, 2015 as lacking legal authority, usurping the Administrator's Court appointed authority as an individual who was not authorized to act on behalf of the Estate, after the Court had denied his petition to be the Administrator. Amy acts after May 19, 2015 should have been solely coordinated with and through the Administrator.

Objectors generally object to David's request for reimbursement as improper for a beneficiary or characterizations of creditor's claims under the creditor's claim procedure under Probate Code §9000 et seq. David could have filed a creditor's claim up to 4 months after November 16, 2015, which has March 16, 2016 and timely included his request in the Estate process. David failed to file a creditor's claim within the time period allowed by law.

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			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt	x		
UCCJEA			
Citation			
FTB Notice			

Probate Status Hearing Re: Filing First Account/Final Distribution

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.		
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: KT</p> <p>Reviewed on: 10/25/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13- Zindars</p>	

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.		
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: KT</p>
		<p>Reviewed on: 10/25/16</p>
		<p>Updates:</p>
		<p>Recommendation:</p>
		<p>File 14- Leach</p>

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.		
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: KT</p> <p>Reviewed on: 10/25/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 15- McCloud</p>	

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> <ol style="list-style-type: none"> <i>Petition</i> does not state the account period pursuant to Probate Code § 1061(a). <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><i>~Please see additional page~</i></p>
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory		
<input checked="" type="checkbox"/> PTC		
<input checked="" type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	W/O	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters	110215	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input checked="" type="checkbox"/> FTB Notice		
		Reviewed by: 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.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Page 9B</u> is a Probate Status Hearing Re: Setting of a Contested Hearing.</p> <p><u>Continued from 8/31/2016.</u></p> <p>Note: Probate Status Hearing for filing of the first and/or final account is set on <u>11/30/2016.</u></p>
		~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		<p>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.</p>	<p>NEEDS/PROBLEMS/COMMENTS: <u>Continued from 8/31/2016.</u> The following issue from the last hearing remains:</p> <ol style="list-style-type: none"> 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			
Aff.Sub.Wit.		<p>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.</p> <p>Minute Order dated 5/25/2016 from the previous hearing on the <i>Petition for Payment of Family Allowance</i> states: Mr. Laird requests 90 days to allow time for discovery prior to setting a trial date; there are no objections to the request. The hearing set on 6/28/2016 is continued to 6/29/2016 per request of Mr. Laird, and with agreement of Counsel. Matter is set on 8/31/2016 for a status hearing regarding setting of a contested hearing.</p>	
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg	X		
Aff.Mail	X		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt	X		
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: LEG</p> <p>Reviewed on: 10/25/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 17B- Bennett</p>	

Probate Status Hearing RE: Filing of the Inventory and Appraisal

DOD: 3/31/2016	KELLEY YOUNGS , daughter, was appointed Administrator with full IAEA without bond.	<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>
	Letters issued 6/2/2016.	
Cont. from	Minute order dated 6/1/2016 set this status hearing re: the filing of the inventory and appraisal.	
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

First Amended Petition to Determine Succession to Real Property

DOD: 11/15/2009		Petitioners are:	NEEDS/PROBLEMS/COMMENTS:
		ROY CARDENAS (son)	
		JUAN G. CARDENAS (son)	
		AURELIA M. LANGFORD (daughter)	
Cont. from		JUAN MANUEL CARDOZA (son)	
<input type="checkbox"/>	Aff.Sub.Wit.	JOSE LUIS CARDOZA (son)	
<input checked="" type="checkbox"/>	Verified	40 days since DOD	
<input checked="" type="checkbox"/>	Inventory	No other proceedings	
<input checked="" type="checkbox"/>	PTC	I&A - \$85,000.00	
<input type="checkbox"/>	Not.Cred.	Decedent died intestate	
<input checked="" type="checkbox"/>	Notice of Hrg	Petitioners request Court determination that decedent's 100% interest in real property located at 276 E. Hawthorne Avenue, Coalinga CA pass to them in equal 20% shares pursuant to intestate succession.	
<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: SEF
			Reviewed on: 10/25/2016
			Updates:
			Recommendation: SUBMITTED
			File 19- Cardenas

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: Filing of the Inventory and Appraisal

	ANGELA WILBANKS ANDERSON and ROBERT C. WILBANKS were appointed co-conservators with bond set at \$148,500 on 7/18/16.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: A Petition for Substituted Judgment is set for hearing on 11/14/16.</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>
	Bond filed on 7/6/16.	
Cont. from	Letters issued on 7/22/16.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.	Minute order dated 7/6/16 set this status hearing for the filing of the inventory and appraisal.	
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: 10/27/16
		Updates:
		Recommendation:
		File 21- Wilbanks

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	
		Please see petition for details.	<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
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.			NEEDS/PROBLEMS/COMMENTS: 1. If diligence is not found, need notice to maternal grandparents pursuant to Probate Code §1511 or further diligence.
	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	AMELIA GUTIERREZ , Spouse, along with SAM GUTIERREZ, MONIKA PETRILLE, and RANDALL GUTIERREZ , adult children, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:
	40 days since DOD	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	No other proceedings	
<input checked="" type="checkbox"/> Inventory	I&A: \$87,000.00 (An undivided 60% interest in real property in Sanger)	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Decedent died intestate	
<input checked="" type="checkbox"/> Aff.Mail	Petitioners request Court determination that the decedent's 60% interest in the Sanger real property passes to them as follows:	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	Amelia Gutierrez: A 20% interest in the decedent's 60% interest	
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp	Sam Gutierrez: A 13.33% interest in the decedent's 60% interest	
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt	Monika Petrille: A 13.34% interest in the decedent's 60% interest	
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202	Randall Gutierrez: A 13.33% interest in the decedent's 60% interest	
<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: 10/26/16
		Updates:
		Recommendation: SUBMITTED
		File 26- Gutierrez

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>			