



## 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.



**2 Christine Dhooghe (CONS/PE) Case No. 13CEPR00111**

**Attorney Teixeira, J. Stanley (for Beverly Ann Hall – Conservator)**

**Probate Status Hearing RE: Proof of Conservatorship Establishment in Nevada**

	<b>BEVERLY ANN HALL</b> , Sister, was appointed Conservator of the Person and Estate on 03/27/2013.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need proof of Conservatorship Establishment in Nevada pursuant to minute order dated 06/07/2016 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 04/04/2013	
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>	On 04/25/2016, Petitioner filed a Petition to Fix Residence Outside the State of California. Hearing was set for 06/07/2016.	
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	On 06/07/2016, the Court granted the petitioner's request to move the conservatee to the State of Nevada.	
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>	Minute Order of 06/07/2016 set this Status Hearing for the filing of Proof of Conservatorship Establishment in Nevada.	
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> LV
		<b>Reviewed on:</b> 11/01/2016
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 2- Dhooghe</b>

**3 Edith Lillian Mitchell Stevens Rev. Liv. Trust Case No. 13CEPR00943**

**Atty Nancy LeVan (for Petitioner, Clarence Dale Stevens)**  
**Atty Donna Standard (for Robert Stevens)**

**Probate Status Hearing RE: All Pending Petitions and Possible Trial Setting**

	<b>CLARENCE DALE STEVENS</b> , as purported, proper successor Trustee of the Edith Lillian Mitchell Stevens Revocable Living Trust presented a "partial" accounting to the court.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need 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>
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>	Petitioner alleged <b>ROBERT STEVENS</b> , trustee of the Sam C. Stevens Revocable Trust was not observing the current court order nor was he administering the Sam C. Stevens Trust therefore, he could only provide the court with a partial accounting of the Edith Lillian Mitchell Stevens Revocable Living Trust.	
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>	The dispute was set for Court Trial.	
<b>Pers.Serv.</b>	<b>Minute order dated 9/27/16 states</b> Ms. Standard represents that she has not had any communication with Robert Stevens. It is unclear as to which matters remain outstanding and require ruling, as the Court does not have all volumes before it today, and counsel is uncertain. The Court notes that it appears that there is an accounting filed on 9/25/15 and a partial account filed on 11/4/14 that have not been addressed, and perhaps the underlying original petition.	
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> KT
		<b>Reviewed on:</b> 11/2/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 3- Stevens</b>

Attorney Stefanie J. Krause (for Petitioner Gary Morris, Jr., Beneficiary)  
 Attorney Jennifer Walters (for Walter A. Morris, Successor Trustee)

Petition to Compel Accounting by Trustee of the Gary F. Morris, Sr. 2013 Trust and Petition for Distribution of Trust Assets to Doug Standing, Trustee of the Gary Morris, Jr. Trust and Petition for Fees and Costs

<b>DOD: 10/19/2013</b>	GARY MORRIS, JR., Beneficiary, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>Petitioner states:</b>	<u>Page 4B</u> is a Fee Waiver Review.
	<ul style="list-style-type: none"> <li>WALTER A. MORRIS was appointed as Successor Trustee of the GARY F. MORRIS, SR., 2013 TRUST on 4/1/2014 [copy of Trust attached as Exhibit A to Declaration of Clerical Error and Omissions filed 10/2/2015];</li> <li>The GARY F. MORRIS, SR., 2013 TRUST terms provide that the balance of the Trust estate, including all assets poured into the Trust as a result of Trustor's death, is to be distributed to BARBARA TURNER, Trustee of the GARY F. MORRIS, JR., TRUST;</li> <li>BARBARA TURNER resigned as Trustee of both Trusts, and WALTER A. MORRIS was appointed as Successor Trustee;</li> <li>Petitioner requests the Court compel WALTER A. MORRIS, as Trustee of the GARY F. MORRIS, SR., 2013 TRUST, to distribute the remaining assets in the GARY F. MORRIS, SR., 2013 TRUST to DOUG STANDING, Trustee of the GARY F. MORRIS, JR., TRUST within 30 days of the order approving this petition;</li> </ul>	<u>Page 4C</u> is the First and Final Account and Report of Trustee.
Cont. from 100615, 111715, 010516, 020916, 031516, 050316, 053116, 071216, 072616, 081716, 092716		<b>Note:</b> Substitution of Attorney filed 9/22/2016 shows Gary Morris, Jr., who was formerly represented by Attorney Nancy LeVan, is now represented by Attorney STEFANIE KRAUSE.
<input type="checkbox"/> Aff.Sub.Wit.		<u>Continued from 9/27/2016.</u> Minute Order states Ms. Krause is new to the case, and counsel agree to a continuance for discussions.
<input checked="" type="checkbox"/> Verified		<b>Note Re Filing Fee:</b> A filing fee of \$435.00 for the <i>Petition to Compel Accounting</i> is currently due from Petitioner, who filed the <i>Petition</i> using a fee waiver, which is pending. The \$435.00 filing fee is appropriately payable from Trust assets pending the fee waiver review.
<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 <span style="float: right;">W /</span>		
<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/S		
<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		
	~Please see additional page~	
		<b>Reviewed by:</b> LEG
		<b>Reviewed on:</b> 11/1/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 4A – Morris</b>

Petitioner states, continued:

- **GARY F. MORRIS, SR., 2013 TRUST** terms provide that the Trustee shall periodically, but not less than once each year, render an account of its administration of the Trust(s) under the Trust instrument to all current income beneficiaries;
- **GARY F. MORRIS, SR's.**, date of death is 10/9/2013 [sic]; **WALTER A. MORRIS** was appointed as Successor Trustee on 4/1/2014; to date, no accounting has been received from **WALTER A. MORRIS**.

Petitioner prays the Court Order:

1. An accounting from **WALTER A. MORRIS** from the period when he was Successor Trustee of the **GARY F. MORRIS, SR., 2013 TRUST** from 4/1/2014 until 8/31/2015;
2. **WALTER A. MORRIS**, Successor Trustee of the **GARY F. MORRIS, SR., 2013 TRUST**, [shall] distribute all of the remaining assets in the **GARY F. MORRIS, SR., 2013 TRUST** to **DOUG STANDING**, Trustee of the **GARY F. MORRIS, JR., TRUST** within 30 days of the signed of the order approving this *Petition*;  
and
3. Allowing attorney fees and costs to Petitioner to be paid by Walter Morris for failure to file accounting and distribute assets pursuant to **GARY F. MORRIS, SR., 2013 TRUST** terms.

Notes for background:

- **Order Removing Walter Morris as Trustee of the GARY F. MORRIS, SR., 2013 TRUST, Appointing Doug Standing as Temporary Successor Trustee; Instructing BofA to Transfer Funds in Checking Account Ending in #8078 to Doug Standing, Successor Trustee of the Gary F. Morris, Sr. 2013 Trust, was filed 7/20/2016.** Order finds **DOUG STANDING** is to deposit all of the funds withdrawn from the [account] into a blocked account in his name as Successor Trustee; Doug Standing is to notify the bonding company of the change of trustees and complete an application for **\$152,137.88** bond and file proof of bond with the Court; Doug Standing is to file with the Court proof of the amount in the previous account and the amount deposited into the blocked account.
- **Order Setting Bond Amount filed 4/25/2015** set bond at **\$286,000.00**, proof of which was filed on 5/9/2014. **Order Reducing Bond Amount** filed 5/13/2015 finds that the bond amount for **WALTER A. MORRIS**, as Trustee of the **GARY F. MORRIS, SR., 2013 TRUST** is reduced to **\$152,137.88**, which is the amount of net proceeds [distributed to the seller of the Trust real property] plus **10%**.

Attorney Stefanie J. Krause (for Petitioner Gary Morris, Jr., Beneficiary)

Fee Waiver Review

<b>DOD: 10/19/2013</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>
Cont. from 100615, 111715, 010516, 020916, 031516, 050316, 053116, 071216, 072616, 081716, 092716		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: LEG</b>
		<b>Reviewed on: 11/1/16</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 4B – Morris</b>

Attorney Stefanie J. Krause (for Petitioner Gary Morris, Jr., Beneficiary)  
 Attorney Jennifer Walters (for Walter A. Morris, former Successor Trustee)

First and Final Account and Report of Trustee and Petition for Its Settlement;  
 and for Final Distribution

<b>DOD: 10/19/2013</b>	<b>WALTER A. MORRIS, [former Successor]</b> Trustee, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Continued from 9/27/2016.</b> Minute Order states Ms. Krause is new to the case, and counsel agree to a continuance for discussions.</p> <p><b>Note:</b> Order Removing Walter Morris as Trustee of the <b>GARY F. MORRIS, SR., 2013 TRUST</b> filed 7/20/2016 finds that <b>DOUG STANDING</b> is to deposit all of the funds into a blocked account in his name as Successor Trustee.</p> <p>1. Objection filed 9/22/2016 requests the First Account be amended to correct the insufficiencies described in the Objection. Declaration of Jennifer L. Walters filed 10/13/2016 appears to be intended in lieu of an amended account, as it contains statements to correct clerical errors in the accounting, and contains a new Exhibit A setting forth the Trustee's time and mileage. Court records do not show proof of service of the Declaration filed 10/13/2016 to the Objector <b>GARY MORRIS, JR.</b>, or to any persons entitled to notice pursuant to Probate Code §§ 15804(a) and 17203(a)(2).  <b>~Please see additional page~</b></p>
<b>Cont. from 092716</b>	<b>Account period: 10/19/2013 – [12/31/2015]</b>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Accounting - <b>\$376,000.00 or \$373,654.07?</b>	
<input checked="" type="checkbox"/> <b>Verified</b>	Beginning POH - <b>\$260,000.00</b>	
<input checked="" type="checkbox"/> <b>Inventory</b>	Ending POH - <b>\$105,500.27</b> (all cash)	
<input type="checkbox"/> <b>PTC</b>	Trustee - <b>\$3,157.00</b> (for services in the sum of \$2,415.00 and gas mileage in the sum of \$742.00; itemized in "Trustee Work Memo" attached as Exhibit A to Declaration filed 10/13/2016;)	
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>		
<input type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>	Attorney - <b>\$768.50 (paid)</b> (not itemized)	
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>	Bond - <b>\$152,137.88</b> (sufficient)	
<input type="checkbox"/> <b>Letters</b>	<b>Petitioner states</b> on 5/20/2014, Decedent's real property on Garlock Lane in Prather was sold for <b>\$350,000.00</b> , and proceeds of <b>\$138,307.44</b> were wired into the trust account on 5/23/2014. Decedent's vehicle (not inventoried) was sold for <b>\$15,000.00</b> and proceeds were deposited into the Trust account on 4/8/2014.	
<input type="checkbox"/> <b>Duties/Supp</b>	<b>Petitioner requests</b> the Trust assets in possession of the [former] Trustee in the sum of <b>\$105,500.27</b> , minus attorney's fees, Trustee fees, and closing costs should be distributed to the Trustee of the <b>GARY F. MORRIS, SR., 2013 TRUST</b> per Trust terms.	
<input checked="" type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
	<b>~Please see additional page~</b>	
		<p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 11/1/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 4C- Morris</b></p>

**Petitioner prays for an Order:**

1. Approving, allowing and settling the First and Final Account and Report of the Trustee; and
2. Confirming and approving all acts and proceedings of Petitioner as Trustee.

**NEEDS/PROBLEMS/COMMENTS, continued:****The following defects from the last hearing remain:**

1. Account period begins on **10/19/2013**, which is several months prior to the actual appointment of Petitioner Walter A. Morris as Successor Trustee by *Order Approving Petition for Appointment of Successor Trustee of the Gary F. Morris, Sr., 2013 Trust* filed 4/1/2014, inferring that Petitioner marshalled assets of the Trust before he was appointed. Account period ends on **12/31/2015** (as stated in *Declaration of Jennifer L. Walters* filed 10/13/2016), which is several months prior to the Court's removal on **7/12/2016** of the Petitioner as Successor Trustee. Need accounting of Trust assets from the Petitioner as Successor Trustee for the period of **1/1/2016 to 7/11/2016**.
- ~~2. Summary of Account on page 2 of the Petition does not list any charges and credits in equal values as required by Probate Code § 1061(b) and (c). However, Summary of Account attached as an Exhibit lists charges as **\$376,000.00**, while credits are listed as **\$373,654.07**, resulting in an unexplained difference of **\$2,345.93**, causing the accounting not to balance. Charges must equal credits as provided by Probate Code § 1061(c). Need clarification and/or amended account pursuant to Probate Code § 1060 et seq. Declaration of Jennifer L. Walters filed 10/13/2016 provides two entries that were not included in the First Account to explain the error; states the accounting now has a discrepancy of **\$4.07** that the former Trustee cannot account for.~~
3. Pursuant to Probate Code § 17201, *Petition* does not but should state the names and addresses of all persons entitled to notice of the *Petition*. Need proof of service by mail of 30 days' notice prior to hearing for the following persons pursuant to Probate Code §§ 15804(a) and 17203(a)(2):
  - **GARY MORRIS, JR.**, Beneficiary;
  - **DOUG STANDING**, current Successor Trustee;
  - **NANCY J. LeVAN**, attorney for Beneficiary;
  - **BARBARA TURNER**, named successor trustee;
  - **RONALD POTTER, JR.**, named successor trustee;
  - **AMERICAN CANCER SOCIETY**, contingent beneficiary;
  - **UNITED CEREBRAL PALSY OF CENTRAL CALIFORNIA**, contingent beneficiary;
  - **JOHN JEFF MORRIS**, son.
4. *Schedule A2, Receipts*, contains question marks at entries dated 4/22/2014 of **\$1,100.00** and 5/6/2014 of **\$10,000.00**. Need clarification.
5. Court may require an itemization of attorney services to support the attorney fees already paid from the Trust of **\$768.50**. (~~*Petition* states a list of Trustee's time and mileage in support of request for trustee fees is attached as Exhibit A; however, no Exhibit A is attached.~~ -- Exhibit A setting forth the Trustee's time and mileage contained in *Declaration of Jennifer L. Walters* filed 10/13/2016.

~Please see additional page~

**Dept. 303, 9:00 a.m. Tuesday, November 8, 2016**

**NEEDS/PROBLEMS/COMMENTS, continued:**

**The following defects from the last hearing remain, continued:**

6. Court may require explanation for the large expenditure listed in *Schedule C1, Disbursements*, dated 6/4/2014 to "Motoring Cal. Co." in the sum of **\$36,200.00**.
7. Need proposed order pursuant to Local Rule 7.1.1(F).

**Beneficiary Gary Morris, Jr.'s. Objection to First and Final Account and Report of Trustee and Petition for its Settlement filed 9/22/2016 states:**

- Gary Morris, Jr. objects to the former Trustee's request for the account to be settled, allowed, and approved on the grounds that it is incomplete and lacks sufficient information;
- Probate Code section 16063(b) provides that an accounting submitted to be approved by the court must comply with Probate Code section 1064, which provides that a petition for approval shall contain "a description of all sales, purchases, changes in the form of assets, or other transactions...that are not otherwise readily understandable from the schedule." The Petition must also have "an explanation of any unusual items appearing in the account."
- The Accounting provided by the former Trustee reflects Charges in the amount of **\$376,000.00** and credits in the amount of **\$373,654.07**. This leaves a difference of **\$2,345.93** that is unaccounted for in the Accounting and not explained in the Report. Objector requests the Accounting be amended to show the whereabouts of this missing amount.
- Objector objects to the former Trustee's request for compensation and reimbursement. Trustees are required to administer the trust as a prudent person would, "with reasonable care, skill, and caution." (Prob. Code sec. 16040(a)). The Trustee failed to administer the trust properly when he refused to provide an accounting, forcing Objector to file a Petition to Compel the Accounting. The Petition to Compel the Accounting was filed 8/27/2015 and it took almost an entire year for the Accounting to finally be submitted.
- The Trustee further failed to administer the Trust properly when he refused to continue payments for Objector's housing, forcing Objector to file a petition for payment. Because the former Trustee failed to administer the Trust as a prudent person would and because he caused so many costly delays, the former Trustee should not be compensated or reimbursed, or the amount awarded should be reduced within the discretion of the Court.

**Objector prays that:**

1. The Petitioner's request for approval of the First Account be denied;
2. The Petitioner's request for approval and allowance of the former Trustees' fees and reimbursement be denied, or the amount awarded reduced within the discretion of the Court;
3. The First Account be amended to correct the insufficiencies described.

**Proof of Service by Mail filed 9/22/2016 shows a copy of the Objection was served to all parties entitled to notice on 9/22/2016.**

**Probate Status Hearing RE: Inventory and Appraisal**

<b>DOD: 03/26/2014</b>	<p><b>RAMON GUIBA</b>, spouse, petitioned the Court to be appointed as Administrator. An Objection was filed by Angela Burke, daughter.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>5B is the Status Hearing regarding the filing of the First and/or Final Account.</b></p> <p><b>Note: Court Trial regarding the Petition for Order Directing Transfer of Property to the Estate was continued to 02/07/2017 pursuant to Minute Order of 11/01/2016.</b></p>
<b>Cont. from 053116</b>	<p><b>PUBLIC ADMINISTRATOR</b>, was appointed pursuant to the minute order of 04/06/2015. Minute Order states: The Court has serious concerns about the abilities of Ramon Guiba to properly execute the demands of a Personal Representative and appoints the Public Administrator forthwith. The Court orders Ramon Guiba and Angela Burke to cooperate with the Public Administrator and turn over any and all estate documents.</p>	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>	<p>Minute Order of 04/06/2015 set this Status Hearing for the filing of the Inventory and Appraisal.</p>	
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: LV</b>
		<b>Reviewed on: 11/02/2016</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 5A- Guiba</b>

**Probate Status Hearing RE: First and/or Final Account**

<b>DOD: 03/26/2014</b>	<p><b>RAMON GUIBA</b>, spouse, petitioned the Court to be appointed as Administrator. An Objection was filed by Angela Burke, daughter.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order of 05/31/2016: Ms. Kruthers reports that there are no assets at this time; matter is trailed to the date of the court trial.</b></p> <p><b>Note: Court Trial regarding the Petition for Order Directing Transfer of Property to the Estate was continued to 02/07/2017 pursuant to Minute Order of 11/01/2016.</b></p>
<b>Cont. from 053116</b>	<p><b>PUBLIC ADMINISTRATOR</b>, was appointed pursuant to the minute order of 04/06/2015. Minute Order states: The Court has serious concerns about the abilities of Ramon Guiba to properly execute the demands of a Personal Representative and appoints the Public Administrator forthwith. The Court orders Ramon Guiba and Angela Burke to cooperate with the Public Administrator and turn over any and all estate documents.</p>	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>	<p>Minute Order of 04/06/2015 set this Status Hearing for the filing of the First and/or Final Account.</p>	
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
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<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: LV</b>
		<b>Reviewed on: 11/02/2016</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 5B- Guiba</b>





**First and Final Report of Personal Representative, Petition for Final Distribution and Allowance of Attorneys' Fees and Waiver of Accounting**

<b>DOD: 11/4/14</b>		<p><b>SUSAN HODGE</b>, Daughter and Executor with Full IAEA without bond, is Petitioner.</p> <p>Accounting is waived</p> <p>I&amp;A: \$1,464,370.00 POH: \$1,464,370.00 (various business interests)</p> <p>Executor (Statutory): Waived</p> <p>Attorney (Statutory): Petitioner requests authorization to pay her attorneys at their agreed rates not to exceed the statutory sum of \$27,643.70. Because the estate has no cash, the personal representative has agreed to arrange for payment from another source.</p> <p>Costs: \$460.50 (petition, cert. letters)</p> <p>Distribution pursuant to Decedent's will:</p> <p>Susan Tanya Hodge, as trustee of the Hagop Soojian Testamentary Trust: Entire Estate</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>	
	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>			
✓	<b>Inventory</b>			
✓	<b>PTC</b>			
✓	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>			
✓	<b>Aff.Mail</b>			w
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
✓	<b>Letters</b>			12/21/15
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
✓	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
✓	<b>FTB Notice</b>			
<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 10/31/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b> SUBMITTED</p> <p><b>File 8- Soojian</b></p>				

9 Glenda Jean Steveson (Estate) Case No. 15CEPR01218

Attorney Thomas A. Markeson (for Petitioner Daniel James Steveson, III, Administrator)

Petition for Approval of First and Final Report of Waiver of Account, for Allowance of Costs Advanced; for payment of Attorney Fees and for Final Distribution

<b>DOD: 11/29/2015</b>		<b>DANIEL JAMES STEVESON, III</b> , son and Administrator, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> <i>Petition</i> and proposed order state the proposed cash distribution as <b>\$296,257.73</b>. However, based upon the sums to be paid from the cash on hand, the distribution of cash should be <b>\$294,682.49</b>. Proposed order has been interlineated to reflect the correct cash distribution of <b>\$294,682.49</b>.</p>
		Accounting is waived.	
<b>Cont. from</b>		I & A — <b>\$330,075.83</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	POH — <b>[\$329,102.75]</b> <i>(\$308,102.75 is cash)</i>	
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>	Administrator — <b>waives</b>	
<input checked="" type="checkbox"/>	<b>PTC</b>	Attorney — <b>\$10,171.52</b> <i>(statutory)</i>	
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Creditor's Claim — <b>\$1,575.24</b> <i>(payable to California Business Bureau for Community Medical Center)</i>	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>	Costs — <b>\$1,673.50</b> <i>(filing fees, probate referee, publication, certified copies)</i>	
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>	<b>Distribution pursuant to intestate succession is to:</b>	
<input type="checkbox"/>	<b>Letters</b> 030716	<ul style="list-style-type: none"> <li><b>DANIEL JAMES STEVESON, III</b> – <b>[\$294,682.49]</b> cash, vehicle, and miscellaneous furniture and personal belongings.</li> </ul>	
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		
		<b>Reviewed by:</b> LEG	
		<b>Reviewed on:</b> 11/1/16	
		<b>Updates:</b>	
		<b>Recommendation:</b> SUBMITTED	
		<b>File</b> 9- Steveson	

<b>DOD: 7/11/2014</b>	<b>STEPHANIE A. COLMENERO</b> , daughter, was appointed Executor with limited IAEA authority without bond, on 06/02/2016.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>	Letters issued 06/02/2016	<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>
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>	Minute Order of 06/02/2016 set this status hearing for the filing of the Inventory and Appraisal.	
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> LV
		<b>Reviewed on:</b> 11/01/2016
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 10- Colmenero</b>

Attorney Gary G. Bagdasarian (for Petitioner Lisa Michele Williams-Taylor, Administrator)

**Waiver of Accounting and Report of Administrator and Petition for its Settlement; Waiver of Administrator's Commissions; for Allowance of Attorney's fees for Ordinary Services, and for Final Distribution**

<b>DOD: 2/27/2016</b>	<b>LISA MICHELE WILLIAMS-TAYLOR</b> , daughter and Administrator, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Accounting is waived.	
<b>Cont. from</b>	I & A — <b>\$272,205.21</b>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	POH — <b>\$150,012.53</b> (\$142,807.32 is cash)	
<input checked="" type="checkbox"/> <b>Verified</b>		
<input checked="" type="checkbox"/> <b>Inventory</b>	Administrator — <b>waives</b>	
<input checked="" type="checkbox"/> <b>PTC</b>	Attorney — <b>\$8,644.10</b> (statutory)	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Costs — <b>\$1,745.21</b> (filing fees, probate referee, publication, bond premium, certified copies)	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>	Closing — <b>\$1,000.00</b> (for accounting services for preparation of Decedent's final income tax returns and fiduciary income tax returns)	
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b> 052016	<b>Distribution pursuant to intestate succession is to:</b>	
<input type="checkbox"/> <b>Duties/Supp</b>	<ul style="list-style-type: none"> <li><b>LISA MICHELE WILLIAMS-TAYLOR – \$131,418.00 cash</b>, vehicle, stock, and furnishings, furniture, and personal effects.</li> </ul>	
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input checked="" type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> LEG
		<b>Reviewed on:</b> 11/1/16
		<b>Updates:</b>
		<b>Recommendation:</b> SUBMITTED
		<b>File</b> 11- Williams

DOD: 04/18/2015		<p><b>JOHN SLATER</b>, husband/named Executor without bond, is petitioner.</p> <p>Full IAEA – o.k.</p> <p>Will dated: 06/26/2002</p> <p>Residence: Fresno Publication: The Business Journal</p> <p><b>Estimated value of the Estate:</b> Personal property - \$45,000.00</p> <p>Probate Referee: Rick Smith</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need Notice of Petition to Administer Estate.</li> <li>2. Need proof of service of the Notice of Petition to Administer Estate pursuant to Probate Code §8110 on: <ul style="list-style-type: none"> <li>• Amy Slater Thomkins</li> <li>• Jay Slater</li> <li>• Eric Slater</li> </ul> </li> <li>3. Need Duties &amp; Liabilities of Personal Representative, Mandatory Judicial Council Form DE-147.</li> <li>4. Need Confidential Supplement to Duties &amp; Liabilities of Personal Representative, Mandatory Judicial Council Form DE-147S.</li> <li>5. Need Order</li> <li>6. Need Letters</li> </ol> <p><b>Note:</b> If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> <li>• <b>Tuesday, 04/04/2017 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <u>and</u></li> <li>• <b>Tuesday, 01/02/2018 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
Cont. from			
Aff.Sub.Wit.	s/p		
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg	x		
Aff.Mail	x		
✓ Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters	x		
Duties/Supp	x		
Objections			
Video Receipt			
CI Report			
9202			
Order	x		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: LV			
Reviewed on: 11/02/2016			
Updates:			
Recommendation:			
File 12- Slater			

Petition for Appointment of Guardian of the Person

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:  <b>Note:</b> As of 10/31/16, all receipts for the mailed notice re ICWA have been filed and all notice issues have been cured.	
Cont. from 062116, 080216, 082316, 092716				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			W
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	Clearances			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 10/31/16	
			Updates:	
			Recommendation:	
			File 13- Bill	

**14 Rubiana Arellano, Elijah Gonzalez (GUARD/P) Case No. 16CEPR00576**

Petitioner: Maria Montalvo (Pro per – Maternal grandmother)

**Petition for Appointment of Guardian of the Person (as to Rubiana only)**

		<b><u>TEMPORARY EXPIRES 11/8/2016</u></b>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>This petition is as to <u>Rubiana</u> only.</b> Petitioner no longer wishes to pursue guardianship of Elijah, because he has been placed with his father.</p> <p><b>Minute order dated 8/2/2016</b> ordered supervised visitation only as to Christina Montalvo.</p> <p><b>Continued from 9/27/2016</b> for notice to paternal grandfather only, which has now been completed.</p>
		MARIA MONTALVO, maternal grandmother, is petitioner	
		<i>Please see petition for details.</i>	
Cont. from 080216, 092716			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv.	w/	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input 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: 11/2/2016
			Updates:
			Recommendation:
			File 14- Arellano/ Gonzalez

Petitioner Sabith Cheth (Pro Per, mother)

Petition for Appointment of Probate Conservator

		<b>NO TEMPORARY REQUESTED</b>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><u>Continued from 9/22/2016.</u></b></p> <p>1. <i>Declaration</i> filed by Petitioner on 9/14/2016 provides further information to the Court regarding the proposed Conservatee, which appears to confirm that Probate Conservatorship is inappropriate for the Petitioner and the proposed Conservatee, pursuant to Probate Code § § 2356(a). <i>Declaration</i> filed 9/21/2016 provides further information that confirms the impropriety of Probate Conservatorship.</p>
		<p><b>SABITH CHETH</b>, mother, is Petitioner and requests appointment as Conservator of the Person.</p> <p><b>Court Investigator's Report was filed on 6/27/2016.</b></p> <p><b>Declaration filed by Petitioner on 9/14/2016.</b></p>	
Cont. from 071416, 081816, 092216			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	Cap. Dec.	X	
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	X	
<input type="checkbox"/>	Aff.Mail	X	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	X	
<input checked="" type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters	X	
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input checked="" type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation	X	
<input type="checkbox"/>	FTB Notice		
		<p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 11/1/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 15- Cheth</b></p>	

Petition for Appointment of Probate Conservator of the Person and Estate

		See petition for details.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Minute Order 9/27/16:</u> Ms. Krause requests a continuance as she was just recently retained.</p> <p><u>Note:</u> Amendment to Petition was filed and served 9/21/16 to clarify request; all changes now reflected in these notes.</p> <p><u>Note:</u> Objections were filed and served on 9/22/16. See additional pages.</p> <p><u>Update:</u> Second Amendment states Section 9 of the petition (re medical consent powers) is deleted in its entirety. However, it is unclear if this is also a withdrawal of the separate petition at Page B. <u>Need clarification.</u></p> <p><u>SEE ADDITONAL PAGES</u></p> <p>Reviewed by: skc</p> <p>Reviewed on: 10/31/16</p> <p>Updates: 11/1/16</p> <p>Recommendation: File 16A- Amarillas</p>	
Cont. from 081616, 092716				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			W
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
✓	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			

Page 2 - NEEDS/PROBLEMS/COMMENTS:

Note: The Fee Waiver was denied; therefore, filing fees will be due upon appointment.

Note: Petitioner requests dementia medication and placement powers under Probate Code §2356.5 via separate *Petition for Exclusive Authority to Give Consent for Medical Treatment* (Page B). However, this request is typically included within the conservatorship petition by checking #1k. Therefore, the request is included in this review.

Update: Second Amendment filed 11/1/16 states Section 9 of the petition (re medical consent powers) is deleted in its entirety. However, it is unclear if this is also a withdrawal of the separate petition at Page B. Therefore, need clarification.

*If medical consent and/or dementia powers are sought, the following issues exist. If not, there are no issues.*

1. Petitioner did not include the *Form GC-313 Attachment Requesting Special Orders Re Dementia* with this petition or with the separate petition. Need GC-313 if dementia medication and placement powers are requested.
2. Also, if dementia powers are requested, continuance is necessary in order for an attorney to be appointed for the Proposed Conservatee pursuant to Probate Code §2356.5(f)(1), and for proper service of such request on the Proposed Conservatee and relatives.
3. Need Capacity Declaration (GC-335) together with separate Dementia Attachment (GC-335A) if dementia powers are requested.

Note: If granted, the Court will set status hearings as follows:

- Tuesday, December 6, 2016 for filing of bond;
- Tuesday, March 7, 2017 for filing the Inventory and Appraisal
- Tuesday, January 2, 2018 for filing the first account.

If the proper items are on file, the status hearings may come off calendar. Otherwise, status report is required per Local Rule 7.5.

Petition for Authority to Give Consent to Med. Treatment

		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Examiner's Note:</b> The request contained in this separate petition has been reviewed in connection with the petition for conservatorship at Page A. See Page A for details.</p>
Cont. from 081616, 092716		
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: 10/31/16
		Updates:
		Recommendation:
		File 16B- Amarillas

**17 Alexandra Reyes, Anthony Reyes, Angel Carrillo (GUARD/P)**

**Case No. 16CEPR00784**

**Petitioner Reyes, Petra (Pro Per – Maternal Grandmother – Petitioner)**  
**Petitioner Reyes, Carlos (Pro Per – Maternal Grandfather – 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 Paternal Grandfather Norberto Dominguez, Sr., per Probate Code §1511.	
<b>Cont. from 092716</b>				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			W
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	Clearances			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		Reviewed by: skc		
		Reviewed on: 10/31/16		
		Updates:		
		Recommendation:		
		File 17- Reyes & Carrillo		

DOD: 05/10/2016		JACKIE M. WATANABE, aka JACKIE M. BUDDLE, daughter/named Executor without bond, is petitioner	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note: If the petition is granted status hearings will be set as follows:</b> <ul style="list-style-type: none"> <li>• <b>Tuesday, 04/04/2017 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <b>and</b></li> <li>• <b>Tuesday, 01/02/2018 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.</li> </ul> Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
Cont. from		Full IAEA – o.k.	
<input type="checkbox"/>	Aff.Sub.Wit. s/p	Will dated: 06/15/1982	
<input checked="" type="checkbox"/>	Verified	Residence: Fresno	
<input type="checkbox"/>	Inventory	Publication: The Business Journal	
<input type="checkbox"/>	PTC	<b>Estimated value of the Estate:</b>	
<input type="checkbox"/>	Not.Cred.	Personal property - \$22,000.00	
<input checked="" type="checkbox"/>	Notice of Hrg	Real property - \$150,000.00	
<input checked="" type="checkbox"/>	Aff.Mail w/	<b>Total - \$172,000.00</b>	
<input checked="" type="checkbox"/>	Aff.Pub.	Probate Referee: Rick Smith	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<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: LV			
Reviewed on: 11/01/2016			
Updates: 11/04/2016			
Recommendation: Submitted			
File 18- Guenther			

Attorney Johns, Dallas (for Petitioners Mollie and Manuel Ortega)

Petition for Appointment of Guardian of the Person

		See petition for details.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> If this petition goes forward, need continuance for investigation.</p> <ol style="list-style-type: none"> <li>1. Need proof of <u>personal</u> service of Notice of Hearing <u>with a copy</u> of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on parents:                     <ul style="list-style-type: none"> <li>- Gabriel Ortega (Father)</li> <li>- Jacquelyn Munoz (Mother)</li> </ul> </li> <li>2. Need proof of service of Notice of Hearing <u>with a copy</u> of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on other relatives:                     <ul style="list-style-type: none"> <li>- Gary Nason (Maternal Grandfather)</li> <li>- Maternal Grandmother</li> <li>- Gabriel Ortega, Jr. (Brother)</li> </ul> </li> </ol>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			w/o
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			x
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 11/1/16	
			Updates:	
			Recommendation:	
			File 19- Ortega	

Petitioner Duarte, Rosemary (Pro Per – Maternal Grandmother – Petitioner)

Petition for Appointment of Guardian of the Person

		See petition for details.	<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need Notice of Hearing.</li> <li>2. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on:                     <ul style="list-style-type: none"> <li>- Augustin Gonzalez, Maternal Grandfather</li> <li>- Noela Gonzalez, Sibling</li> </ul> </li> <li>3. The Court may require further diligence re father and paternal grandparents per Minute Order 9/21/16.</li> </ol>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			x
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			x
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 11/1/16	
			Updates:	
			Recommendation:	
			File 20- Gonzalez-Hernandez/ Hernandez	

Petitioner Augustine Palacios, Jr. (Pro Per, paternal grandfather)  
 Petitioner Sandra Palacios (Pro Per, paternal grandmother)

**Petition for Appointment of Guardian of the Person**

		<b>TEMPORARY EXPIRES 11/8/2016</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>AUGUSTINE PALACIOS, JR., and SANDRA PALACIOS</b> , paternal grandparents, are Petitioners.	
		<i>~Please see Petition for details~</i>	
		Court Investigator's Report was filed 11/1/2016.	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	Clearances		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 11/1/2016
			Updates: 11/2/16
			Recommendation:
			File 21- Palacios

Petition for Appointment of Guardian of the Person

See petition for details.			<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Note:</u> If this petition goes forward, need continuance for investigation.</p> <ol style="list-style-type: none"> <li>1. Need proof of <u>personal</u> service of Notice of Hearing <u>with a copy</u> of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on parents: <ul style="list-style-type: none"> <li>- Gabriel Ortega (Father)</li> <li>- Mercedes Garcia (Mother)</li> </ul> </li> <li>2. Need proof of service of Notice of Hearing <u>with a copy</u> of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on other relatives: <ul style="list-style-type: none"> <li>- Maria Garcia (Maternal Grandmother)</li> <li>- Maternal Grandfather</li> <li>- Silbings age 12 or older (Andria, Janessa)</li> </ul> </li> <li>3. If granted, need Order, Letters.</li> </ol> <p>Reviewed by: skc</p> <p>Reviewed on: 11/1/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 22- Ortega</p>
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w/o	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	x	
✓	Conf. Screen		
	Letters	x	
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report	x	
	Clearances	x	
	Order	x	
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		

Attorney Curtis D. Rindlisbacher (for Petitioner Theresa Gayle Smith Zelazny, daughter)

Petition for Probate of Lost Will and for Letters Testamentary; Authorization to Administer under the Independent Administration of Estates Act

DOD: 7/5/2016		<p><b>LETTERS OF SPECIAL ADMINISTRATION EXPIRE 11/8/2016</b></p> <p><b>THERESA GAYLE SMITH ZELAZNY</b>, daughter, and second named alternate Executor without bond, is Petitioner. <i>(First named executor is deceased; first named alternate executor declines to serve per Attachment 3f(1)(d).)</i></p> <p>Full IAEA: OK</p> <p>Lost Will Dated: <b>10/7/1978</b></p> <p>Residence: Fresno</p> <p>Publication: Business Journal</p> <p><b>Estimated value of the Estate:</b>                  Real property - <b>\$49,000.00</b>                  Personal property - <b>\$10,000.00</b>                  Total - <b>\$59,000.00</b></p> <p>Probate Referee: Steven Diebert</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note Re Special Administration:</b>                  Order Appointing Special Administrator filed 9/27/2016 appoints Petitioner <b>THERESA GAYLE SMITH ZELAZNY</b> without IAEA authority and without bond, and grants Petitioner authority to take control of all Decedent's bank accounts and pay administrative expenses, including maintaining the residence and utilities; and grants the power to list the estate real property for sale.</p> <p><b>Note Re Bond:</b> Proposed personal representative is a resident of Texas. Court may require bond in an amount determined by the Court if the proposed personal representative resides outside California or for other good cause, even if the will waives bond, pursuant to California Rule of Court 7.201(b) and Probate Code § 8571. Court may require bond in the sum of <b>\$59,000.00</b>.</p> <p align="center">~Please see additional page~</p>	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/
<input checked="" type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p><b>Reviewed by:</b></p> <p><b>Reviewed on:</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 23- Smith</b></p>		

**NEEDS/PROBLEMS/COMMENTS, continued:**

1. Probate Code § 6124 provides if the testator's will was last in the testator's possession, the testator was competent until death, and neither the will nor a duplicate original of the will can be found after the testator's death, it is presumed that the testator destroyed the will with intent to revoke it. This presumption is a presumption affecting the burden of producing evidence. *Petition* provides no information nor produces any evidence regarding the inability to locate the Decedent's original Will so that the Court may determine whether the presumption of destruction of the Will by the Decedent is overcome.
2. Decedent's Will was executed in the State of Oregon, City of Lake Oswego, County of Clackamas. Probate Code § 6113(b) provides that a Will is valid in California if its execution complied with the law of the place of execution at the time of execution. Pursuant to Probate Code § 6113(b), need proof that the execution of Decedent's Will complied with the law in the state of Oregon on 10/7/1978, the date of execution of the Will by Decedent.
3. Item 3(e)(2) of the *Petition* states Decedent's Will is self-proving. If Petitioner is able to establish the Will was executed in compliance with the law of Oregon on 10/7/1978, Petitioner then must establish that the Will is self-proving according to the law of Oregon on 10/7/1978, the date of execution of Decedent's Will. If Petitioner is able to establish the Will is valid in California, but Petitioner is unable to establish that Decedent's Will is self-proving according to the law of Oregon, need *Proof of Subscribing Witness* to the Will pursuant to Probate Code § 8220.
4. Item 5(a) of the *Petition* is incomplete as to (3) or (4) re: registered domestic partner.
5. Probate Code § 8223 provides a petition for probate of a lost or destroyed will shall include a written statement of the testamentary words or their substance. If the will is proved, the provisions of the will shall be set forth in the order admitting the will to probate. Pursuant to Probate Code § 8223, need revised proposed order containing the provisions of the lost Will (i.e., a copy of the Will attached to the order with signature line included on the last page of the Will for the Court's approval.)

**Note: If *Petition* is granted, Court will set Status Hearings as follows:**

- **Thursday, December 8, 2016 at 9:00 a.m. in Dept. 303 for the filing proof of bond, if Court requires bond;**
- **Thursday, April 13, 2017 at 9:00 a.m. in Dept. 303 for the filing of the final inventory and appraisal; and**
- **Thursday, January 11, 2018 at 9:00 a.m. in Dept. 303 for the filing of the first account and/or petition for final distribution.**

Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.

**24 William Beck (Det. Succ)**

**Case No. 16CEPR00997**

**Attorney Pascuzzi, Susan L. (for Richard Bollenbacher & Brandon Bollenbacher – Petitioners)**

**Petition to Determine Succession to Real Property**

<b>DOD: 10/11/2014</b>	<b>RICHARD BOLLENBACHER</b> , stepson, and <b>BRANDON BOLLENBACHER</b> , step grandson, are petitioners.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need clarification as to whether Richard Bollenbacher, stepson, and Michael Bollenbacher (listed as predeceased stepson) are the issue of Gloria J. Beck, predeceased spouse.</li> <li>2. Petition indicates at #10c that the <i>decedent is survived by other heirs under Probate Code 6400 et seq.</i> Pursuant to Local Rule 7.1D, if a beneficiary, heir, child, spouse, or registered domestic partner in any action before the Probate Court is deceased, that person's date of death shall be included in the petition. Need date of death of decedent's mother, and father and any siblings.</li> </ol>
	40 days since DOD	
<b>Cont. from</b>	No other proceedings	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Decedent died intestate	
<input checked="" type="checkbox"/> <b>Verified</b>	Petitioners request Court determination that decedent's 100% interest in real property located at 1313 E. Griffith Way, Fresno, Ca. pass 50% to Richard Bollenbacher, and 50% to Brandon Bollenbacher, pursuant to intestate succession.	
<input checked="" type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	w/	
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> LV
		<b>Reviewed on:</b> 11/01/2016
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 24- Beck</b>

Attorney Richard E. Hemb (for Petitioner Evangeline Bolger, surviving spouse)

Spousal or Domestic Partner Property Petition

DOD: 11/27/2015		EVANGELINE BOLGER, surviving spouse, is Petitioner.  ~Please see Petition for details~	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. <i>Petition</i> states a copy of the Grant Deed recorded on 12/31/2002 is attached; however, no such attachment is included.  2. <i>Proof of Service by Mail</i> filed 9/28/2016 shows notice was served to <b>LAURIE MCCABE</b> on 9/27/2016. For purposes of verifying notice is properly served, need clarification of the inconsistency appearing in the name of Decedent's daughter as <b>LAURIE MCBRIDE</b> (in Petition) or <b>LAURIE MCCABE</b> (on Notice.)	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input 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: 11/1/16		
		Updates:		
		Recommendation:		
		File 25- Bolger		

Petitioner Aguilar, Gloria (Pro Per – Paternal Aunt – Petitioner)

Petition for Appointment of Temporary Guardian of the Person

		See petition for details.	<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <p><u>Note:</u> This petition is for Eduardo and Della only.</p> <p>A separate petition for Nathan (9) filed by his paternal aunt Janet Barajas is set for 11/10/16.</p>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
N/A	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: 11/3/16	
			Updates:	
			Recommendation:	
			File 26- Nava/ Gomez	

Petitioner Ascencion Cordero Villa (Pro Per, sister)

**Petition for Appointment of Temporary Conservator of the Person**

		<p align="center"><b><u>GENERAL HEARING SET FOR 12/7/2016</u></b></p> <p><b>ASCENCION CORDERO VILLA</b>, sister, is Petitioner and requests appointment as Conservator of the Person.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need Notice of Hearing.</li> <li>2. Need proof of five (5) court days' notice by personal service of the <i>Notice of Hearing</i> and a copy of the <i>Petition for Appointment of Temporary Conservator</i> for:                         <ul style="list-style-type: none"> <li>• Carlos Cordero Gomez, proposed Conservatee.</li> </ul> </li> <li>3. Need proof of five (5) court days' service by mail of the <i>Notice of Hearing</i> and a copy of the <i>Petition for Appointment of Temporary Conservator</i> for all relatives listed in the Item 11 of the Petition Pursuant to Probate Code 2250(e).</li> </ol>	
<b>Cont. from</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input type="checkbox"/>	<b>Notice of Hrg</b>			X
<input type="checkbox"/>	<b>Aff.Mail</b>			X
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			X
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>			
<input checked="" type="checkbox"/>	<b>Letters</b>			
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			X
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			
		<b>Reviewed by:</b> LEG		
		<b>Reviewed on:</b> 11/2/16		
		<b>Updates:</b>		
		<b>Recommendation:</b>		
		<b>File 27- Gomez</b>		

**First and Final Report of Co-Executors and Petition for Final Distribution on Waiver of Accounting and for Payment of Statutory Fees**

<b>DOD: 12/1/2014</b>	<b>DAVID M. SERIMIAN</b> and <b>MARLON D. SERIMIAN</b> , sons and Co-Executors, are Petitioners.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need proof of service of notice with a copy of the <i>Supplemental Declaration and Correction to First and Final Report of Co-Executors and Petition for Final Distribution on Waiver of Accounting</i> filed 11/2/2016 for all interested persons, including <b>BARBARA SERIMIAN, DAVID M. SERIMIAN,</b> and <b>MARLON D. SERIMIAN</b>, and all persons requesting special notice, including <b>JOSEPH MARCHINI, VICTORIA J. SALISCH,</b> and <b>WILLIAM T. McLAUGHLIN, II.</b></li> <li>2. Need waiver of accounting signed by <b>DAVID M. SERIMIAN,</b> and <b>MARLON D. SERIMIAN</b>, who are now estate distributees per the <i>Supplemental Declaration and Correction to First and Final Report of Co-Executors and Petition for Final Distribution on Waiver of Accounting</i> filed 11/2/2016. <b>~Please see additional page~</b></li> </ol>
<b>Cont. from</b>	Accounting is waived. (waiver by Barbara Serimian filed 10/17/2016;)	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>		
<input checked="" type="checkbox"/> <b>Inventory</b>	I & A — <b>\$964,378.32 ??</b> POH — <b>Need valuation</b> (\$15,902.21 is cash; 39.50% interest in real property consisting of 1.07 acres owned by the Estate, per <i>Supplemental Declaration and Correction to First and Final Report of Co-Executors and Petition for Final Distribution on Waiver of Accounting</i> filed 11/2/2016;)	
<input checked="" type="checkbox"/> <b>PTC</b>		
<input checked="" type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input checked="" type="checkbox"/> <b>Sp.Ntc.</b>	Co-Executors — <b>waive</b>	
<input type="checkbox"/> <b>Pers.Serv.</b>	Attorney — <b>\$22,287.57</b> (statutory; payable partially from remaining cash of \$15,902.21, <del>and from funds advanced to the estate by Petitioners pursuant to the settlement agreement;</del> <i>Supplemental Declaration states a "lien against the real property" will be in place for fund deficiency;</i> )	
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>   072915		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>	Attorney X/O — <b>waives</b> (assisting trial counsel with estate-related litigation, reviewing and revising proposed settlement, advising executors on settlement;)	
<input checked="" type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>	Costs — <b>\$1,233.65</b> (filing fees, publication, certified copies; payable from funds advanced to the estate by Petitioners pursuant to the settlement agreement;) <i>Supplemental Declaration states a "lien against the real property" will be in place for fund deficiency;</i> <b>~Please see additional page~</b>	
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>		

**Petitioners state:**

- Petitioners entered into a settlement in April 2016 [with Judge Hamilton] of ongoing litigation that had preceded Decedent's death [consolidated Cases 11CECG03770; 15CECG03572];
- **DANIEL L. SERIMIAN**, nephew, and **LESLIE A. MORGAN**, niece, alleged Decedent took actions such as co-mingling funds, over-charging expenses, disparate treatment benefitting Decedent's sons to the detriment of his brother's children, fraudulent transfers of assets and/or interests in the family businesses, and other claims;
- Pursuant to the settlement agreement, Petitioners entered into a plan of liquidation of Decedent's interest in **D&L, INC.**, resulting in a **39.50%** interest in real property being received by the estate, which, pursuant to the settlement agreement, was conveyed to **DANIEL L. SERIMIAN**, nephew, and **LESLIE A. MORGAN**, niece, the son and daughter of Decedent's predeceased brother, **LIONEL SERIMIAN** (copies of deeds transferring the real property attached as Exhibits A-1 and A-2);
- *Creditor's Claims* filed 9/15/2015 in this matter arising out of the litigation were each withdrawn pursuant to the settlement agreement [claims by corporations and individuals and amounts of each claim outlined on page 3, lines 6 to 16];
- The residue of the estate distributable per terms of the trusts created by Decedent's Will is to be shares to **BARBARA SERIMIAN**, **DAVID M. SERIMIAN**, and **MARLON D. SERIMIAN**, the latter two shares to be distributed outright and free of trust upon final determination and payment of federal estate taxes or state death taxes, of which none are due; no trusts will be created under the Will provisions as there are no assets to distribute.

**Petitioner requests distribution pursuant to Decedent's Will to BARBARA SERIMIAN** of ½ community property interest in household furnishings, furniture, and personal belongings.

**Supplemental Declaration and Correction to First and Final Report of Co-Executors and Petition for Final Distribution on Waiver of Accounting** filed 11/2/2016 states Attorney Knudson was advised that the estate received **39.50%** interest in real property following liquidation of the D&L corporation; he was advised that the real property was further conveyed to **DANIEL L. SERIMIAN** and **LESLIE A. MORGAN** pursuant to settlement among the parties. Through inadvertence, he did not notice that one of the parcels of real property was not conveyed, and he was advised that the particular parcel was not property that was to be conveyed to **DANIEL L. SERIMIAN** and **LESLIE A. MORGAN** under the settlement agreement, but that the property remains in the estate.

**Petitioner requests additional distribution, pursuant to Supplemental Declaration and Correction to First and Final Report of Co-Executors and Petition for Final Distribution on Waiver of Accounting** filed 11/2/2016, to **DAVID M. SERIMIAN**, and **MARLON D. SERIMIAN** of a **39.50%** interest in real property.

**NEEDS/PROBLEMS/COMMENTS, continued:**

3. *Final Inventory and Appraisal* filed 9/28/2016 does not include the **39.50%** interest in real property owned by the estate. Need *Supplemental Inventory and Appraisal* indicating the **39.50%** interest in real property is shown as an estate asset and appraised by the assigned Probate Referee, **STEVEN D. DEIBERT**. (*Supplemental Declaration and Correction to First and Final Report of Co-Executors and Petition for Final Distribution on Waiver of Accounting* filed 11/2/2016 providing an estimation of the **39.50%** interest based upon the valuation of other real property is insufficient.)

~Please see additional page~

**NEEDS/PROBLEMS/COMMENTS, continued:**

4. Need consent to distribution of estate real property in undivided interests from **DAVID M. SERIMIAN**, and **MARLON D. SERIMIAN** as to the **39.50%** interest, pursuant to Local Rule 7.12.4(A).
5. Proposed order finds on page 3, lines 20 to 22, that to the extent that the estate has insufficient funds to pay attorney fees and costs, such deficiency shall be "paid by the residuary distributees and shall be a lien against the real property until paid." Neither the *First and Final Report* filed 10/4/2016, nor the *Supplemental Declaration and Correction to First and Final Report of Co-Executors and Petition for Final Distribution on Waiver of Accounting* filed 11/2/2016 include such prayer for a lien on distributed real property for payment of attorney fees and costs.