

(1) Third and Final Account Current and Report of Conservator, (2) Petition for Conservator's Fees for Discharge of Conservator, and for (3) Authority to Liquidate the Estate by Summary Disposition (Prob. C. 1861(a)(1), 1863(c), 2620, 2631(a) & (b), and 2640)

DOD: 9/10/10		CRYSTAL FOREMAN , Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		<u>Account Period: 1/6/10 – 9/10/10</u>	
Cont. from			
	Aff.Sub.Wit.	Accounting	\$42,977.52
		Beginning POH	\$32,316.00
√	Verified	Ending POH	\$29,538.00
	Inventory		
	PTC		
	Not.Cred.		
		<u>Subsequent Account Period: 9/11/10 – 8/2/11</u>	
√	Notice of Hrg		
√	Aff.Mail	Accounting	\$32,371.21
	Aff.Pub.	Beginning POH	\$29,538.00
	Sp.Ntc.	Ending POH	\$ 0.00
	Pers.Serv.		
	Conf. Screen	Conservator	\$1,571.66
	Letters	Attorney	Not requested
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
√	Order	Petitioner requests the Court approve, allow, and settle the Account, as wells as approve the acts of Conservator; confirming Conservator's commission in the sum of \$1,571.66, for an order discharging the Conservator.	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: NRN
			Reviewed on: 11/3/11
			Updates:
			Recommendation:
			File 1 - Shirey

(1) Petition for Final Distribution on Waiver of Account and (2) for Allowance of Compensation for Ordinary Services (Prob. C. 11640 & 10954)

DOD: 6/29/08		<p>RONALD E. RASMUSSEN, nephew and Executor, is Petitioner.</p> <p>Accounting is waived.</p> <p>I&A \$176,444.65 POH \$193,366.95 (no cash)</p> <p>Executor waives (statutory)</p> <p>Attorney \$6,293.34 (statutory)</p> <p>Petitioner requests distribution, pursuant to Decedent’s Will, as follows:</p> <p>Ronald E. Rasmussen: 100% of estate</p>	<p>NEEDS/PROBLEMS/COMMENTS:</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 type="checkbox"/>	Notice of Hrg			
<input type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			9/18/08
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
<p>Reviewed by: NRN</p> <p>Reviewed on: 11/3/11</p> <p>Updates:</p> <p>Recommendation: SUBMITTED</p> <p>File 4 - Busick</p>				

(1) First and Final Account of Executor and Petition for Its Settlement; (2) for Allowance of Fees and (3) for Final Distribution (Prob. C. 11600)

DOD: 12/09/10	DAVID JESSEN , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 12/09/10 – 09/30/11	
	Accounting - \$125,761.68	
Cont. from	Beginning POH - \$123,671.00	
<input type="checkbox"/> Aff.Sub.Wit.	Ending POH - \$125,657.44	
<input checked="" type="checkbox"/> Verified	(\$110,157.44 is	
<input checked="" type="checkbox"/> Inventory	cash)	
<input checked="" type="checkbox"/> PTC	Executor - waives	
<input checked="" type="checkbox"/> Not.Cred.	Attorney - \$4,769.72	
<input checked="" type="checkbox"/> Notice of Hrg	(statutory)	
<input checked="" type="checkbox"/> Aff.Mail w/	Distribution, pursuant to decedent's Will, is to:	
Aff.Pub.	David Jessen, as Trustee of the Christian W. Jessen Living Trust, dated January 22, 1997 - \$105,387.72 cash plus a 2006 Cadillac DTS and household furnishings and personal effects.	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters 04/13/11		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
<input checked="" type="checkbox"/> FTB Notice		
	Reviewed by: JF	
	Reviewed on: 11/03/11	
	Updates: 11/08/11	
	Recommendation: SUBMITTED	
	File 6 - Jessen	

Petition for Order Fixing and Allowing Court-Appointed Attorney's Fees

DOD: 9/8/11		<p>DEBORAH BOYETT, petitioner was Court appointed to represent the Conservatee on 4/6/2011.</p> <p>PUBLIC GUARDIAN was appointed Conservator of the Person and Estate on 4/14/2011.</p> <p>Petitioner requests fees in connection with the representation of the Conservatee for the Public Guardian's petition to appoint a conservator.</p> <p>Petitioner asks that she be paid from the conservatorship estate for 6.10 hours @ \$225.00 per hour for a total of \$1,325.50.</p> <p>Services are itemized by date and include review of documents, visits with client, and court appearances.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cont. from			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail	W/O		
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: 11/3/11	
		Updates:	
		Recommendation:	
		File 7 - Kasparian	

(1) First and Final Account of Executor and Petition for Its Settlement; (2) for Allowance of Fees and (3) Final Distribution (Prob. C. 11600)

DOD: 01/27/11	DALE ALAN REED , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 01/27/11 – 09/30/11	
Cont. from	Accounting - \$100,000.00	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$100,000.00	
<input checked="" type="checkbox"/> Verified	Ending POH - \$100,000.00	
<input checked="" type="checkbox"/> Inventory	Executor - waives	
<input checked="" type="checkbox"/> PTC	Attorney - \$4,000.00	
<input checked="" type="checkbox"/> Not.Cred.	(statutory)(to be paid outside of the estate)	
<input checked="" type="checkbox"/> Notice of Hrg	Distribution, pursuant to decedent's Will, is to:	
<input checked="" type="checkbox"/> Aff.Mail w/	Dale Alan Reed - ½ interest in real property	
Aff.Pub.	Donna Jean Myers Jennings – ½ interest in real property	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters 04/20/11		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
<input checked="" type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 11/03/11
		Updates: 11/08/11
		Recommendation: SUBMITTED
		File 8 - Reed

Petition to Compel Trustee to Account for Attorney's Fees and for Removal of Trustee [Prob. C 17200(b)(7)]

Marie Moore DOD: 10-15-96	<p>TIMOTHY E. MOORE, Beneficiary and Second Successor Trustee, is Petitioner.</p> <p>Petitioner states that in the 4½ years that TERENCE MOORE has served as Trustee, he has never provided a Notice of Administration of the Trust or an account, although Petitioner has made several informal requests.</p> <p>On 2-23-11 Petitioner, through his counsel, made formal written demand for account, and on 3-9-11, the Trustee mailed copies of the trust documents to Petitioner's counsel, without account.</p> <p>A second formal demand was sent on 3-14-11, and on 3-16-11, a response from Trustee's counsel requested until 6-23-11 to complete the account.</p> <p>On 6-22-11, counsel for Petitioner received a fax from Trustee with a letter and some information regarding the gun collection and value of the guns; however, an accounting was not provided, and the fax stated: <i>"Now as to Tim going to court to force the issues and/or remove me as Trustee. Do what you have to do."</i></p> <p>Petitioner states he has had to retain counsel, and asks the court to order Trustee to reimburse Petitioner for attorney's fees and costs. Attorney Roberts' declaration indicates \$826.00 incurred through 6-30-11, plus \$395.00 in costs for filing, plus \$1,400.00 for 4.5 hours @ \$280.00/hr since 6-30-11, and anticipates additional fees for appearance, etc., with respect to this petition.</p> <p>Petitioner requests that:</p> <ol style="list-style-type: none"> 1) The Trustee be ordered to petition the court for settlement of the account and give notice on the Petition; 2) The court order the Trustee to pay Petitioner's attorney's fees and costs; 3) The court remove the Trustee and appoint Petitioner as Second Successor Trustee; 4) The court order the Trustee to turn over all information relative to the Trust to Petitioner. <p align="center">SEE PAGE 2, 3</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 8-25-11</u>: The Court orders that an accounting be prepared and notice be given to the appropriate parties.</p> <p><u>Minute Order 10-6-11</u>: Mr. Markeson advises the Court that he is representing Jonna Key and Richard Elston. All parties agree that the checks are needed. The Court orders Terence Moore to contact his attorney Mr. Coleman by the close of business today and advise him if he has the checks or will be ordering them.</p> <p><u>On 10-12-11, Jonna Key, Richard A. Elston and Vern E. Elston (step-siblings of Petitioner and Trustee) filed a Petition to Determine Validity of Trust that is set for hearing on 11-29-11.</u></p> <p><u>As of 11-4-11, no account has been filed. The following issues remain noted:</u></p> <ol style="list-style-type: none"> 1. Attorney's fee calculation appears to contain mathematical error (4.5 hours @ \$280.00/hr totals \$1,260.00). The court may require clarification and/or complete itemization. 2. <u>SEE EXAMINER'S NOTES REGARDING THE TRUST AND AMENDMENT DOCUMENTS ON PAGE 2.</u> 	
Edward C. Moore DOD: 9-16-06			
Cont. from 082511, 100611			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail			W
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

PAGE 2 OF 3

SUMMARY (Continued):

Alternatively, Petitioner requests that:

- 1) Trustee be ordered to petition the court for settlement of the account and give notice on the Petition; and
- 2) Such other order and further relief as it may deem proper.

Response of Terence Moore filed and served 8-19-11 states that the Trustee will provide an accounting within 60 days of the hearing in this matter. Trustee has provided copies of the trust and amendment, and has ordered statements from the bank in which trust funds are held. The bank has worked with Trustee when his truck was broken into and the Trust checkbook ledger was stolen from the vehicle. The information is currently being collected for the accounting.

Trustee objects to his removal because it is not reasonably likely that a material breach of trust has occurred. Trustee provided information detailing the guns and rifles, and has obtained fair market value figures for them. Trustee has preserved all personal property in a storage facility and has sold the residence in Porterville.

Trustee states he has not acted inconsistent with the intent of the Settlor, but has made cash distributions in accordance with the terms of the trust. Within the first year he distributed to each of the three beneficiaries the sums of \$75,000.00 each, \$50,000.00 each, and \$25,000.00 each. Trustee has 37 years' experience, reputation, and ability in the insurance industry reading complicated contracts and has read and understands the family trust. Trustee has taken his fiduciary duties very seriously and has sought to distribute under the terms.

Trustee objects to his payment of Petitioner's attorney's fees. Trustee has acted in good faith and has not breached his fiduciary duties or obligations, but to the extent possible, has communicated with beneficiaries the status of the trust.

Trustee prays that:

- 1) The court order that Trustee has 60 days to provide an accounting;
- 2) This court will allow Trustee to continue his duties as Trustee;
- 3) This court not order Trustee to pay Petitioner's attorney's fees; and
- 4) For all other proper orders.

NEEDS/PROBLEMS/COMMENTS (Continued):

1. **The Amendment is dated 1997 – after the death of the first Settlor.**
2. **It originally appeared from the Petition that the issue at hand involved the Surviving Settlor's portion (Edward Moore's guns); however, based on the Response and further review of the Petition, it appears that both Petitioner and Trustee may be acting as if the Amendment amended the entire family trust.**
3. **The Amendment disinherits the first-deceased Settlor's children (*these beneficiaries' step-siblings*), and further amends the section appointing Successor Trustees, which is inappropriate after the death of the first Settlor.**
4. **Pursuant to Probate Code §17201, Petitioner listed himself, the Trustee, and their sister Deborah as the only trust beneficiaries; however, it appears that their three step-siblings are also beneficiaries.**
5. **Further, the step-siblings were also originally included as Successor Co-Trustees. Therefore, it does not appear that the appropriate notice has been provided, and it also appears that the Trustee may be acting inappropriately by serving as sole trustee pursuant to the Amendment.**
6. **The Response indicates that the Trustee has sold the Porterville home and made numerous monetary distributions to the beneficiaries (he and his own siblings). However, Examiner notes that the Porterville home is listed on Schedule A as a Trust asset not designated to either Settlor, and therefore may have been community property that would pass to all beneficiaries, including those disinherited by the Amendment. Further, the described distributions appear to conflict with Trust §5.02(m).**
7. **Therefore, the court may require clarification regarding the administration of the trust since the death of the second Settlor.**

SEE PAGE 3

SUMMARY (Continued):

Declaration of Petitioner Timothy Moore filed 10-5-11 states that both attorneys stated that the step-siblings were not beneficiaries of the Amended Trust; however, the Court pointed out that the trust became irrevocable upon Marie Moore's death, which was prior to the amendment. Petitioner states he has spoken with one of the step-siblings, Jonna Key, and obtained addresses for the others.

On 9-13-11 and 10-3-11, Petitioner received email correspondence from Terence, the Trustee (attached). From the tone and content, Petitioner believes Terence knew the amendment was invalid, and the email states that Petitioner's "idiot attorney" should have read the trust and "understood what it said then he would have known that it became irrevocable on Marie's death in 1996."

Petitioner believes that Terence knew the amendment was invalid and that the step-siblings should have been given notice of the trust administration and receive their beneficial interest.

Petitioner states Terence is threatening him in the emails because he exposed his misconduct. Terence has intentionally failed to provide us with the accounting and failed to notify the step-siblings of the trust and its administration.

Petitioner believes the estate to be worth approx. \$500,000.00, but there has not been an accounting or inventory. Petitioner, Terence, and their sister Debbie have received distributions, but without an accounting, Petitioner does not know where the money has gone. Petitioner states: "The trustee has kept everything secret from the beneficiaries."

Petitioner states it has been almost nine months since he first requested an accounting in writing, and three months since filing the petition and almost six weeks since the last hearing. Terence has not provided an accounting or any information of any kind. Instead he spent his time writing 6-page emails threatening me if I do not back off and for exposing his wrong-doing to the Court.

Terence Moore has not performed his fiduciary duties as a Trustee and should be removed and the Successor Trustees as named in the Trust should be appointed: Timothy Moore (Petitioner) and Jonna Key (step-sibling) as Co-Trustees.

DOD: 6-27-10		<p>BARBARA J. PALMQUIST, Surviving Spouse, is Petitioner.</p> <p>No other proceedings</p> <p>Will dated 12-4-06 devises entire estate to the trustee of the Palmquist Family Trust dated 3-26-90 as amended and restated 12-4-06.</p> <p>Petitioner requests court confirmation that her 50% community property interest in four parcels of real property belongs to her, and that Decedent’s 50% interest in the real property passes to her.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 9-8-11</u>: The Court directs counsel to file supporting points and authorities or an amended petition.</p> <p><u>As of 11-4-11</u>, nothing further has been filed. The following issue remains:</p> <p>1. Petitioner requests court confirmation that Decedent’s 50% community property interest in certain real property passes to her as Surviving Spouse; however, Decedent’s Will dated 12-4-06 devises his entire estate to the Palmquist Family Trust. Need clarification.</p>
Cont. from 090811			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail	W		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Updates:</p> <p>Contacts: Reviewed 11-4-11</p> <p>Recommendation:</p> <p>Reviewed by: skc</p> <p>File 10 - Palmquist</p>	

Petition for Letters Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 6/19/11		RUSSELL J. EARLS , nephew, is petitioner and requests appointment as Administrator with bond set at \$60,000.00	NEEDS/PROBLEMS/COMMENTS:	
Cont. from 100611				
Aff.Sub.Wit.				Full IAEA – o.k. Decedent died intestate. Residence: Fresno Publication: Fresno Business Journal
✓ Verified				
Inventory				
PTC				
Not.Cred.				
✓ Notice of Hrg				
✓ Aff.Mail	W/			
✓ Aff.Pub.				
Sp.Ntc.		<u>Estimated value of the estate:</u> Personal property - \$ 3,000.00 Annual income - \$ 1.00 Real property - \$56,600.00 Total - \$59,601.00		
Pers.Serv.				
Conf. Screen		Probate Referee: RICK SMITH		
✓ Letters				
✓ Duties/Supp				
Objections				
Video Receipt				
CI Report				
9202				
✓ Order				
Aff. Posting				
Status Rpt				
UCCJEA		Reviewed by: KT Reviewed on: 11/3/11 Updates: Recommendation: SUBMITTED File 11 - Earls		
Citation				
FTB Notice				

Atty Walters, Jennifer L. (for Ronald Markarian – spouse/competing Petitioner)

Atty Harris, Richard A. or Markeson, Thomas (for Pamela Milam – daughter/Petitioner)

Atty Sanoian, Joanne (court appointed for Conservatee)

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

Age: 78 DOB: 07/17/33		<u>TEMPORARY EXPIRES 11/10/11</u>		NEEDS/PROBLEMS/COMMENTS: CONTINUED FROM 10/12/11 <u>Court Investigator advised rights on 09/20/11</u> Voting rights affected. Need minute order. <u>Note:</u> The Petitioner proposes to place all liquid assets into a blocked account, and has provided an Order to Deposit Money into Blocked Account. If the Court determines a bond is necessary, bond should be set at \$300,740.00.	
Cont. from 101211		PAMELA MILAM , daughter, is petitioner and requests appointment as conservator of the person with medical consent and dementia powers to administer dementia medications and for appointment as conservator of the estate with all liquid funds placed in a blocked account.			
<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.				
<input checked="" type="checkbox"/>	Conf. Screen				
<input checked="" type="checkbox"/>	Letters				
<input checked="" type="checkbox"/>	Duties/Supp				
<input type="checkbox"/>	Objections				
<input checked="" type="checkbox"/>	Video Receipt				
<input 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 checked="" type="checkbox"/>	Citation				
<input type="checkbox"/>	FTB Notice				
		Estimated value of the Estate: Personal property - \$260,000.00 Annual income - \$ 13,400.00 Total - \$273,400.00			
		Declaration of Michael Nisco, M.D. Petitioner states the proposed conservatee is not capable of living on her own. She has severe dementia, cannot cook, cannot feed herself and cannot sit up by herself. She does not communicate other than responding “I love you” when someone says it to her first. She also says no at times when she gets agitated. She hallucinates and speaks to persons who are not there.			
		Petitioner also states that a conservatorship of the estate is necessary because, due to her severe dementia, the proposed conservatee can no longer add, subtract, divide, or multiply even simple numbers. She is compliant and not able to communicate her needs. She is not able to comprehend the effect of legal documents. If left on her own, she would not be able to maintain what she has and keep it safe.			
		Nomination and consent to appointment of Pamela Milam by proposed conservatee’s son, Ronald Markarian, and daughter, Sandra Markarian were filed 09/08/11.			
		Court Investigator Dina Calvillo’s report was filed 10/05/11.			
		SEE PAGE 2			
				Reviewed by: JF	
				Reviewed on: 11/03/11	
				Updates:	
				Recommendation:	
				File 12A - Markarian	

Declaration of Court Appointed Counsel Joanne Sanoian filed 10/12/11 states that the proposed conservatee is unable to voice her opinion on this matter. Ms. Sanoian states that Ms. Markarian is receiving good care in her daughter's home and has improved significantly since being released from the hospital to the point of possibly not needing hospice care any longer. Ms. Sanoian states that she met with Ms. Markarian's daughter, Pamela as well as her husband Mr. Markarian. Ms. Sanoian states that she does not believe that Mr. Markarian fully understands the extent of care his wife needs and does not feel having him be her primary care provider is a good idea. However, it is apparent that there is tension between Mr. Markarian and his three children and he has been limited in the visitation time allowed with his wife while she is residing in Ms. Milam's home. Mr. Markarian states that he feels like he is watched carefully when he visits his wife at his daughter's home and feels that he should be able to spend time alone with his wife of almost 60 years. Ms. Sanoian states that arrangements should be made for frequent contact between the proposed conservatee and Mr. Markarian, perhaps at a neutral private home. Mr. Markarian has stated that he has another house that he could take his wife to live in that is not cluttered, however, Ms. Sanoian does not think this is a good idea. Ms. Sanoian states that there is also a controversy between Mr. Markarian and Ms. Milam regarding the proposed conservatee's wishes regarding burial. Ms. Milam states the proposed conservatee wants to be cremated, while Mr. Markarian wants his wife to be buried with him in a plot that he has at Ararat Cemetery. Ms. Sanoian states that although, not a pressing issue, the cremation versus burial issue may be best left to the sound discretion of the Court, a neutral arbitrator or mediator.

Atty Walters, Jennifer L. (for Ronald Markarian – spouse/competing Petitioner)

Atty Harris, Richard A. (for Pamela Milam – daughter/Petitioner)

Atty Sanoian, Joanne (court appointed for Conservatee)

Petition for Exclusive Authority to Give Consent for Medical Treatment

Age: 78	PAMELA S. MILAM , daughter, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
DOB: 07/17/33		
	Petitioner requests medical consent powers and dementia powers to administer dementia medication.	<p style="text-align: center;">CONTINUED FROM 10/12/11</p> <p>1. The petitioner has requested medical consent powers in her Petition for Appointment of Probate Conservator, therefore, this petition appears to be unnecessary.</p>
Cont. from 101211		
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: JF
		Reviewed on: 11/03/11
		Updates:
		Recommendation:
		File 12B - Markarian

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

Age: 78 DOB: 07/17/33	TEMPORARY CONSERVATORSHIP OF THE PERSON ONLY WAS GRANTED TO DAUGHTER, PAMELA MILAM; EXPIRES 11/10/11	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 10/12/11</u> Page 12A is the competing petition of Pamela Milam, daughter. As of 11/03/11, no additional documents have been filed and the following remains outstanding: <ol style="list-style-type: none"> 1. Need Capacity Declaration. 2. The petition does not specify the amount of bond requested. 3. Need Citation and proof of personal service of the Citation on the proposed conservatee. 4. Need receipt for viewing of conservatorship video.
Cont. from 10/06/11	RONALD MARKARIAN , spouse, is petitioner and requests appointment as Conservator of the person with medical consent and dementia powers to administer dementia medications and for appointment as conservator of the estate with bond set at [NOT SPECIFIED].	1. Need Capacity Declaration. 2. The petition does not specify the amount of bond requested. 3. Need Citation and proof of personal service of the Citation on the proposed conservatee. 4. Need receipt for viewing of conservatorship video.
<input type="checkbox"/> Aff.Sub.Wit.	Estimated value of the estate: Personal property - \$100,000.00 Annual income - \$ 35,000.00 Total - \$135,000.00	
<input checked="" type="checkbox"/> Verified	Petitioner states he has been married to the conservatee for close to 60 years. He and the conservatee have always resided together and leaned on one another. Currently the conservatee has dementia, in addition to other mental and physical conditions. In 2008, Conservatee was diagnosed with Alzheimer's. During that same year, Conservatee's daughter Pamela Milam, had a medical Power of Attorney drafted for her mother and her mother signed it. Petitioner was not provided with any information regarding this Power of Attorney until recently and is consequently being pushed out of medical decisions for his wife. Petitioner states Conservatee was recently hospitalized. After being admitted, Petitioner tried to visit the Conservatee and was told that he could not visit during her stay, was not entitled to any information, and upon release Conservatee would be released to her daughter, Pamela. Ronald called his daughter, Pamela and she indicated that she was moving the Conservatee to her home and seeking hospice care. She also indicated she would make no arrangements to allow Petitioner to see his wife. Petitioner states he has always provided security and financial stability for the Conservatee. Their money and property is commingled and there is no reason or documentation that would entitle anyone else to serve as the conservator of the estate. See Page 2 for more information	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
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<input type="checkbox"/> 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 x		
<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		
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<input type="checkbox"/> FTB Notice		
Reviewed by: JF		
Reviewed on: 11/03/11		
Updates:		
Recommendation:		
File 12C - Markarian		

12C Benny Markarian (CONS/PE)

Case No. 11CEPR00779

Atty Walters, Jennifer L. (for Ronald Markarian – husband/Petitioner)

Atty Harris, Richard A. (for Pamela Milam – daughter/competing Petitioner)

Atty Sanoian, Joanne (court appointed for Conservatee)

Additionally, in the last month documents have been received regarding the Conservatee's finances and that bank accounts have been opened in the Conservatee's and Pamela's name. These bank accounts have been opened since 2008 and Pamela has tried to remove significant amounts of money from them. Conservatee and Petitioner have built a significant estate and Petitioner is concerned that if he does not receive temporary and permanent conservatorship that funds will disappear or title to the property will be changed.

Court Investigator Dina Calvillo's report was filed 10/05/11.

Dept. 303, 9:00 a.m. Thursday, November 10, 2011

Atty Walters, Jennifer L. (for Ronald Markarian – spouse/competing Petitioner)

Atty Harris, Richard A. (for Pamela Milam – daughter/Petitioner)

Atty Sanoian, Joanne (court appointed for Conservatee)

Petition for Enforcement of Support of Conservatee Spouse from Community Property (Prob. C. 3080 et seq)

Age: 78	<p>PAMELA S. MILAM, daughter, is Petitioner.</p> <p>Petitioner filed petitions for appointment of Temporary and General Conservator of the Person and Estate of Benny Markarian on 09/02/11.</p> <p>Ronald Markarian, the conservatee’s husband, filed petitions for appointment of Temporary and General Conservator of the Person and Estate of Benny Markarian on 09/01/11.</p> <p>Petitioner was appointed Temporary Conservator of the Person Ex Parte on 09/07/11. The Temporary Conservatorship of the Person has been extended to 11/10/11.</p> <p>Petitioner states that the conservatee and her spouse, Ronald Markarian, have community property that is under the exclusive control of Ronald Markarian who has refused and/or failed to contribute to the conservatee’s support. The conservator requires the assistance of home health care workers to care for the conservatee. The home health care workers are not covered by the conservatee’s insurance or Medicare and costs about \$1,150.00 per month. In addition, the conservatee has expenses for food, clothing and associated expenses that currently run about \$350.00.</p> <p>Petitioner prays for and Order:</p> <ol style="list-style-type: none"> 1) Restraining Ronald Markarian from transferring, encumbering, hypothecating, concealing, or any way disposing of any property, except in the usual course of business for necessities of life during the pendency of this proceeding; 2) Requiring Ronald Markarian to notify Petitioner of any proposed extraordinary expenditures and to account to the Court for all such extraordinary expenditures during the pendency of this proceeding; 3) Requiring Ronald Markarian to pay expense arrears according to proof and the amount of \$1,500.00 per month, or according to proof, for the future support of the conservatee pending the determination of this Petition; 4) Requiring Ronald Markarian to serve and file an income and expense declaration pursuant to Probate Code § 3084; and 5) For other such and further relief as the court deems appropriate, including an order dividing the community property and turning over the conservatee’s community interest to the conservator of her estate, should Ronald Markarian refuse to comply with any order made pursuant to this petition or Probate Code § 3080 – 3092. 	NEEDS/PROBLEMS/COMMENTS:
DOB: 07/17/33		
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
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<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
See Page 2 for more information		
		Reviewed by: JF
		Reviewed on: 11/03/11
		Updates: 11/09/11
		Recommendation:
		File 12D – Markarian

Response to Petition for Enforcement of Support of Conservatee Spouse from Community Property filed 11/08/11 by Ronald Markarian states:

- 1) Respondent is the conservatee's husband and they have been married for 58 years;
- 2) Respondent confirms that he and the conservatee have community property consisting of an Air Force Pension and personal finances in the form of cash and real property;
- 3) Respondent adamantly denies refusing to provide for assistance of his wife through the use of community property funds;
- 4) Respondent, both through his attorney and personally, has repeatedly requested information regarding the financial obligations in regards to supporting the conservatee and as of October 27, 2011, no response has been received;
- 5) On September 19, 2011 respondent's attorney received a request for payment of \$750.00 from opposing counsel for half of the costs of home care provided by Right at Home;
- 6) On September 22, 2011 respondent's attorney received a letter from opposing counsel stating that if opposing counsel's office was not contacted by September 26, 2011, they would proceed in filing this petition;
- 7) On September 22, 2011 respondent's counsel contacted opposing counsel by e-mail and stated that the respondent was prepared to contribute to the conservatee's care, but wanted the billing information and a list of what services were provided, further opposing counsel was provided my healthcare insurance information and information about the possibility of its assistance in paying for expenses;
- 8) No response was received from opposing counsel and this Petition was filed requesting an Ex Parte order restraining me from transferring, encumbering, or disposing of any property that would be considered community property because there is a danger that respondent will attempt to hide the property. Respondent states that this notion is absurd and insulting;
- 9) Respondent states that he has a strained relationship with his children and that his wife has been living in his daughter's home for the last few months. Respondent states that he has been given a visitation schedule to visit his wife, and that he has learned of a medical power of attorney that was drafted without his knowledge in 2008, and that Petitioner is now trying to limit the control he has over his own property;
- 10) Respondent states that he has never indicated that he would not take care of his wife, or that he would squander or hide their community property;
- 11) Respondent states that his attorney has repeatedly requested financial information regarding his wife's care so that he could contribute what was necessary. Even requesting this information at the last hearing that was held in the conservatorship matter;
- 12) On October 20, 2011, respondent provided a check to the Conservator, Pamela Milam, in the amount of \$750.00 after not receiving any response to his request for more information. Included with the check was a letter requesting an invoice or additional financial information. The check and letter were returned by opposing counsel stating that they were moving forward with this Petition;
- 13) Respondent states that this Petition is not necessary and that these issues can be dealt with through amicable conversation between the parties and their attorneys. Respondent states that it is impractical and rather unreasonable for the Petitioner to believe Respondent should pay all the funds requested but not provide Respondent with any proof or information regarding the care;
- 14) Respondent believes that Petitioner is acting this way to convince the Court that she should be appointed as Conservator of the Estate of my wife and have control over her community property interest. Respondent states that is not necessary and suggests, in the alternative, that open lines of communication between the parties and reasonable financial information is provided so that all parties are apprised of the situation.

Respondent, Ronald Markarian, also filed an Income & Expense Declaration on 11/08/11.

See Page 3 for more information

Reply to Response to Petition for Enforcement of Support of Conservatee Spouse From Community Property filed 11/08/11 by Petitioner, Pamela Milam, states:

- 1) The Response to my Petition by Ronald Markarian, is misleading and deficient in several respects and the Petition is necessary to secure the conservatee's right to support from community assets;
- 2) Contrary to what is stated in the Response, Respondent has not requested information about the conservatee's costs of care. Respondent has only requested information about the services being provided to her. Respondent believes that Medicare should be responsible for payment of the cost of care and has been reluctant to provide any information regarding the community property finances or account information and is failing to cooperate in disclosing his community property retirement payments and other community property accounts in order to control the care that the conservatee receives as well as the community cash flow. Petitioner states that Respondent is violating his fiduciary duties by failing to timely provide information to both the Petitioner and the Court regarding the community property;
- 3) Petitioner states the spouse of a conservatee has a duty to support his spouse as stated in the Petition. The conservatee should not have to support herself from her separate property when ample community property assets exist for that purpose;
- 4) On 11/05/11, Petitioner's attorney received an income and expense declaration showing substantial income and liquid assets.
- 5) To date, Petitioner has spent \$4,056.23 on the conservatee's care and it has become necessary to increase the hours of Right at Home (a private caregiver) to 50 hours per week due to the Petitioner resuming her employment. Accordingly, the estimated monthly expenses for the conservatee's care will be \$4,620.00 for home care, food, supplies and utilities.
- 6) Therefore, Petitioner states it is appropriate that all orders prayed for in her Petition be granted.

DOD: 4/30/11	<p>JANET G. SHIRINIAN, surviving spouse and Trustee, is Petitioner, and brings her Petition pursuant to PrC §850(a)(3).</p> <p>Petition states:</p> <ul style="list-style-type: none"> Petitioner became sole Trustee of the Richard and Janet Shirinian Living Trust dated 1/10/00 (“Shirinian Trust”) upon Decedent’s death and executed a Certificate of Trust on 8/8/11 (<i>Death Certificate attached to Petition as Exh. A and Certificate of Trust attached as Exh. B</i>); It was attorney David A. Silva, back in 2000, who prepared the Shirinian Trust for Petitioner and Decedent, and also performed legal work relating to the transfer of assets to the Trust; As Decedent Richard Shirinian is a beneficiary of the Elizabeth T. Wilson Estate (<i>current Los Angeles County Superior Court Case No. BP 003725</i>) (“Wilson Estate”), Petitioner recalls executing the assignment document for Decedent’s portion of the Wilson Estate with Attorney Silva’s assistance; However, Petitioner is unable to locate the original (or copy) of the assignment, or the original (or copy) of the Shirinian Trust’s Exhibit A. Additionally, Petitioner is unable to locate Attorney Silva or his files or records, as Silva is now ineligible to practice law in California, due to a client’s allegations of fraud. Silva, who Petitioner believes has relocated to another state, failed to return to Petitioner or Decedent their files or records, and Silva never provided a forwarding address; Petitioner and Decedent did in fact intend for the Wilson Estate share to be part of the Shirinian Trust estate, and did assign and transfer said asset to the Shirinian Trust through Silva. <u>This is evident from the Shirinian Trust’s Section 4.04, entitled “Distribution Upon Death of Survivor” (attached to Petition as Exh. C), which states the Wilson Estate share is part of the Shirinian Trust and upon Decedent’s death, was to be distributed to Decedent’s two daughters.</u> <i>[Note: Petitioner states that Decedent also executed a pour-over Will (copy attached to Petition as Exh. D) concurrently with the Shirinian Trust, which designates the residue of Decedent’s estate be added to the Trust and administered/distributed pursuant to the Trust. No estate assets exist outside of the Shirinian Trust and therefore probating the Will would be untimely and costly.]</i> At the 8/18/11 hearing in the (Los Angeles) Wilson Estate case, on that Estate’s Waiver of Account, Report of Administrator and Petition for Final Distribution – the court continued the matter to <u>11/10/11</u>. The L.A. Court requested that Petitioner Shirinian obtain an order from the Fresno Court, confirming 1) that the Shirinian Trust is valid and remains in existence; 2) that Decedent’s share in the Wilson Estate is part of the Shirinian Trust estate; 3) that the Wilson Estate’s administrator shall distribute the Wilson Estate share directly to the Shirinian Trust and 4) that Petitioner is authorized, as Trustee, to execute any and all documents, waivers, required for the Wilson Estate Administrator, to distribute Decedent’s share to the Shirinian Trust – including the waiver of accounting as requested in the Wilson Estate’s Petition for Final Distribution. Petitioner therefore requests that this Court Order 1) the Shirinian Trust dated 1/10/00 is valid and in existence; 2) confirm the Decedent’s distributive share of the Wilson Estate as part of the Shirinian Trust estate; 3) that the Administrator of the Wilson Estate (<u>Madeline T. DeAntonio</u>) distribute Decedent’s share directly to Petitioner as sole trustee and; 4) that Petitioner is authorized to execute all documents and waivers required by Ms. DeAntonio to distribute said share to the Shirinian Trust, including the waiver of accounting as requested in the Second Supplement to Waiver of Account/Report of Administrator and Petition for Final Distribution - <i>filed in the Wilson Estate matter, and currently set for hearing on 11/10/11.</i> 	NEEDS/PROBLEMS/COMMENTS:
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
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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		
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<input type="checkbox"/> Status Rpt		
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		Reviewed by: NRN
		Reviewed on: 11/4/11
		Updates: 11/8/11
		Recommendation:
		File 13 - Shirinian

Petition for Letters of Administration; Authorization to Administer Under IAEA
 (Prob. C. 8002, 10450)

DOD: 8/28/11	ALEXIS SHARPTON , daughter, is petitioner and requests appointment as Administrator without bond.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	All heirs waive bond.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Full IAEA – o.k.	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC	Decedent died intestate.	
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	Residence: Fresno Publication: Fresno Business Journal	
<input checked="" type="checkbox"/> Aff.Mail	W/	
<input checked="" type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.	Estimated value of the estate:	
<input type="checkbox"/> Pers.Serv.	Personal property - \$ 50,000.00	
<input type="checkbox"/> Conf. Screen	Real property - <u>\$250,000.00</u>	
<input checked="" type="checkbox"/> Letters	Total - \$300,000.00	
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections	Probate Referee: RICK SMITH	
<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: KT
		Reviewed on: 11/3/11
		Updates:
		Recommendation: SUBMITTED
		File 14 – Sharpton

Spousal or Domestic Partner Property Petition (Prob. C. 13650)

DOD: 4/10/10		<p>FELICIA LOPEZ, surviving spouse, is petitioner.</p> <p>No other proceedings</p> <p>Decedent died intestate.</p> <p>Petitioner states ?????</p> <p>Petitioner requests real property be determined to be having belonged to her upon the death of the decedent.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Petition does not include any facts upon which the court can determine that the property passes to the surviving spouse. The decedent died intestate and pursuant to the petition was survived by children and the issue of predeceased child(ren). Need facts upon which the Petitioner alleges the property should pass to the surviving spouse. #5(a)(2) of the petition indicated the decedent was survived by issue of a predeceased child. Need name and date of death of the predeceased child(ren) pursuant to Local Rule 7.1.1D. Need Order 				
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<input type="checkbox"/>	Inventory						
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<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	X					
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<input type="checkbox"/>	FTB Notice						
<table border="1"> <tr> <td>Reviewed by: KT</td> </tr> <tr> <td>Reviewed on: 11/3/11</td> </tr> <tr> <td>Updates:</td> </tr> <tr> <td>Recommendation:</td> </tr> <tr> <td>File 15 - Lopez</td> </tr> </table>			Reviewed by: KT	Reviewed on: 11/3/11	Updates:	Recommendation:	File 15 - Lopez
Reviewed by: KT							
Reviewed on: 11/3/11							
Updates:							
Recommendation:							
File 15 - Lopez							

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 5/22/11		<p>JEANNE L. LOWE, named executor without bond, is petitioner.</p> <p>Full IAEA – o.k.</p> <p>Will dated: 6/20/1972</p> <p>Residence: Fresno</p> <p>Publication: Fresno Business Journal</p> <p><u>Estimated value of the estate:</u> Real property- \$60,000.00</p> <p>Probate Referee: RICK SMITH</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
Cont. from				
<input checked="" type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
	Inventory			
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	Pers.Serv.			
	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
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	Objections			
	Video Receipt			
	CI Report			
	9202			
<input checked="" type="checkbox"/>	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
		Reviewed by: KT		
		Reviewed on: 11/4/11		
		Updates:		
		Recommendation: SUBMITTED		
		File 16 - Wong		

Spousal or Domestic Partner Property Petition (Prob. C. 13650)

DOD: 6/24/11		MARILYN MCALLISTER, surviving spouse, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		No other proceedings	
Cont. from		Will dated 11/10/1989 devises entire estate to spouse, Marilyn McAllister.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Petitioner requests court confirmation that Decedent's interest in real property passes to her pursuant to Decedent's Will.	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input 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		Reviewed by: KT
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		Reviewed on: 11/4/11
<input type="checkbox"/>	UCCJEA		Updates:
<input type="checkbox"/>	Citation		Recommendation: SUBMITTED
<input type="checkbox"/>	FTB Notice		File 17 - McAllister

Atty Kruthers, Heather H (for Public Guardian)
 Attu Enmark, M (for Marian Shubin, beneficiary, in her bankruptcy proceedings)

Probate Status Hearing Re: Further Status of Final Accounting

Age:	<p>PUBLIC GUARDIAN was appointed Successor Trustee on 11-14-05.</p> <p>On 6-21-11, the Third and Final Account was settled and distribution was ordered.</p> <p>Minute order from 6-21-11 (Judge Gallagher) states: Mr. Enmark advises the Court that there is a resolution in this matter. The Court directs counsel to submit a revised order regarding the Marian Shubin distribution which is to be consistent with the stipulation. Petition is granted, Order to be signed Ex Parte.</p> <p><u>The order settling the Third and Final Account, and for distribution, was approved as to form and content by Attorney Enmark on 6-22-11, and signed by Judge Oliver on 6-27-11.</u></p> <p>The order provides distribution as follows:</p> <ul style="list-style-type: none"> To Timothy Lundstrom (directly): \$27,018.52+ To Signe Lundstrom (in trust): \$27,0187.53+ (<i>On 8-5-11, proof of opening account was filed</i>). Marian Shubin's share (indirectly as follows, due to the bankruptcy proceedings): <ul style="list-style-type: none"> - \$163,20 Public Administrator - \$1,335.00 County Counsel - \$200.00 Fresno Superior Court - \$11,000.00 R.J. Collins Plumbing Co, Inc. - \$14,320.33 Michael H. Meyer, (Chapter 13 Trustee) 	NEEDS/PROBLEMS/COMMENTS:
DOD:		<p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Order signed 6-27-11.</p>
Cont. from 082511, 100611		
Aff.Sub.Wit.		
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Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>Updates:</p> <p>Contacts: Reviewed 11-4-11</p> <p>Recommendation:</p> <p>Reviewed by: skc</p> <p>File 18 - Lundstrom</p>	

Atty Cross, Robert W. M., sole practitioner of Selma (for Irma Lozano, Administrator)

Status Hearing Re: Closing the Estate

DOD: 10/11/2003		<p>IRMA LOZANO, daughter, was appointed Administrator without bond on 1/2/2007 and <i>Letters</i> issued on that date.</p> <p><i>Order Settling First Account and Report of Administrator</i> was signed on 4/7/2007, showing the estate on hand consists of real property valued at \$215,500.00.</p> <p><i>Minute Order</i> dated 4/7/2011 from the hearing on the <i>First Account</i> set this status hearing for closing the estate.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 10/6/11. Minute Order states:</u> The Court notes for the record that Mr. Cross is unavailable today and is requesting a continuance. The matter is continued to 11/10/11.</p> <p>1. Need second account and/or petition for final distribution, or a current status report pursuant to Local Rule 7.5(B).</p> <p>Note: Court records show the last document filed in this matter is a <i>Dismissal of Creditor's Claim and Withdrawal of Request for Special Notice</i> filed on 7/5/2011 indicating the Department of Health Care Services withdraws its \$57,783.17 claim and its special notice request.</p>
Cont. from 100611			
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Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
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Order			
Aff. Posting			
Status Rpt	X		
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: LEG/NRN	
		Reviewed on: 11/4/11	
		Updates:	
		Recommendation:	
		File 19 – Lozano	

Atty Milnes, Michael A., sole practitioner (for Executor Carol S. Rankin)

Probate Status Re: Declaration of Estate Without Assets & Termination of the Estate

DOD: 6/20/2009	<p>CAROL S. RANKIN, spouse, was appointed Executor without bond on 6/29/2010 and <i>Letters</i> issued on 2/4/2011.</p> <p><u>Minute Order dated 8/25/2011 from status hearing for failure to file an Inventory and Appraisal states:</u> Counsel advises the Court that there is no property in the estate, and everything has been dealt with in the State of Illinois. Counsel further advises that he will be filing a declaration regarding no assets and a petition for termination of the estate. Matter is set for Status Hearing on 10/6/2011. If the documents are filed by 10/6/2011, no appearance will be necessary.</p> <p><u>Attorney Milnes' Status Report filed 10/5/2011 states:</u> Attorney Milnes prepared a Petition for Termination of Administration of Estate Having No Assets and for Discharge of Executor (copy attached), and presented it on 10/5/2011 to the Probate Clerk for filing and setting a hearing date, at which time he was informed that a filing fee of \$395.00 was required; he was prepared to advance \$40.00 for filing the Petition, but he will require that his client advance the \$395.00 required for the filing fee; he is confident his client will advance the funds and the Petition will be filed in the next 10 days.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 10/6/11. Minute Order states:</u> No appearances. The court continues the matter to 11/10/11 and orders Mr. Milnes to be present at that time. If the petition is filed by 11/10/11, the matter can be taken off calendar.</p> <p>1. Court records do not show that a declaration and a petition for termination of the estate have been filed in this matter per <i>Minute Order</i> dated 8/25/2011.</p> <p><u>Nothing has been filed in this matter since the last status report, filed 10/5/11.</u></p>
Cont. from 100611		
Aff.Sub.Wit.		
Verified		
Inventory		
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Status Rpt		
UCCJEA		
Citation		
FTB Notice		
Reviewed by: LEG/NRN		
Reviewed on: 11/4/11		
Updates:		
Recommendation:		
File 20 - Allen		

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 01/22/08		<p>KAREN SLOAN, daughter, was appointed Administrator and letters were issued on 06/09/11.</p> <p>Minute order dated 06/09/11 set this matter for a status hearing on 11/10/11 for filing of the Inventory & Appraisal.</p> <p>Clerk’s Certificate of Mailing states that a copy of the minute order dated 06/09/11 was mailed to Karen Sloan on 06/10/11.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Inventory & Appraisal.</p>
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory	x		
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: JF</p> <p>Reviewed on: 11/04/11</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 21 - Sloan</p>	

Lalien, 3 DOB: 03/30/08		<p align="center"><u>GENERAL HEARING 01/04/12</u></p> <p>JENNIFER GRAFFIA, paternal aunt, is Petitioner.</p> <p>Father: PAUL GIGLIO</p> <p>Mother: CRYSTAL HARPER</p> <p>Paternal grandfather: DECEASED Paternal grandmother: YVONNE GIGLIO</p> <p>Maternal grandfather: WESLEY HARPER Maternal grandmother: DECEASED</p> <p>Petitioner states that both parents are drug users and are incarcerated. Petitioner states that both of the parents have asked her to take guardianship of the children. Petitioner states that she has a nice home with a room already set up for the girls. Petitioner states that the paternal grandmother lives with her in the home and will also provide care and love for the girls.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> along with a copy of the <i>Petition for Temporary Guardianship</i> or Consent and Waiver of Notice or Declaration of Due Diligence for: - Paul Giglio (father) - Crystal Harper (mother)</p>	
Lariassa, 1 DOB: 09/10/10				
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			x
<input type="checkbox"/>	Aff.Mail			
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<input type="checkbox"/>	Pers.Serv.			x
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		Reviewed by: JF		
		Reviewed on: 11/04/11		
		Updates:		
		Recommendation:		
		File 22 - Giglio		