



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.

Probate Status Hearing RE: Filing of an Insolvent Estate Petition

DOD: 1/12/89	<p>DOLORES TRUJILLO and MARY ELLEN RODRIGUEZ, Daughters, were appointed Co-Administrators without IAEA and with bond of \$8,000.00 on 1/16/90.</p> <p>Bond was filed and Letters issued on 1/17/90; however, nothing further was filed.</p> <p>The open estate was discovered and the Court set a status hearing for 8/14/14.</p> <p>After numerous continuances, an I&A was filed on 10/1/14 showing the estate value at \$30,000.00.</p> <p>On 2/23/15, the Court confirmed the sale of the real property and ordered the net proceeds of \$12,000.00 to be deposited into a blocked account; however, pursuant to Minute Order 7/1/15, the sale was invalidated.</p> <p>Minute Order 8/11/15: Counsel represents that due to the \$50,697.12 owed in back taxes and the fact that the County now has the authority to sell the property, with plans to auction it in March, she has been unable to find an agent willing to list the property. The Court directs her to obtain additional information from the County.</p> <p>Minute Order 10/6/15: Counsel represents that she confirmed with the County that the sale of the property will not occur until February/March 2016, as they sell all properties at one time during the year. Counsel requests 30 days to file an insolvent estate petition. If the petition is filed at least two court days prior, then no appearance is necessary on 11/17/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Petition filed 11/16/15 is set for hearing on 1/20/16.</p>
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FTB Notice		

2 Frances B. Van Camp (Estate) Case No. 05CEPR00250

**Atty Kruthers, Heather H. (for Public Administrator)
 Probate Status Hearing Re: Failure to File a Petition for Final Distribution**

DOD: 11-25-04	FRESNO COUNTY PUBLIC ADMINISTRATOR was appointed Successor Administrator on 11-28-06.	NEEDS/PROBLEMS/COMMENTS: 1. Need petition for final distribution.
	Background: PRESTON VAN CAMP , Grandson, in pro per, was appointed as Administrator with Full IAEA without bond on 4-12-05 and Letters issued 4-14-05. Pursuant to various Assignments of Interest, Preston Van Camp was also to be the sole beneficiary. I&A filed 8-11-05 indicated a total estate value of \$175,249.00 consisting of real and personal property.	
Cont from 041814, 052314, 111714, 011215, 012015, 030315, 071415	A status report filed 4-17-09 indicated that the decedent apparently owed taxes since 1997; therefore, the Administrator needed a 6-month continuance to sell assets, pay creditors, and file the petition for final distribution. The Administrator did not appear at the continued hearing date; however, and an OSC was issued.	
Aff.Sub.Wit.	On 11-28-06, Preston Van Camp was removed as Administrator and the Public Administrator was appointed as Successor Administrator.	
Verified	The former Administrator was ordered to file his final account and distribute to the Public Administrator. The former Administrator's account and later his amended account detailed various transactions, including granting an option to purchase the real property. The Public Administrator filed objections, and both the original account and the amended account were ultimately denied. According to the amended petition, all assets inventoried (real and personal property) remained on hand.	
Inventory	On 11-5-07, the Court ordered the assets turned over to the Public Administrator and reserved the right to surcharge.	
PTC	There was no further activity in this case until 2-14-14 when the Court set this status hearing for failure to file a petition for final distribution.	
Not.Cred.	Status Report filed 11/13/15 states the PA filed an Unlawful Detainer action for the eviction of Pamela Van Camp from the real property belonging to the estate and was granted a judgment and a writ was issued. Ms. Van Camp was evicted. She filed a Notice of Appeal, but failed to file her brief before the deadline. She obtained an extension and filed her brief before the new deadline. On 10/21/15, the Court mailed a Notice to Appellant of Failure to Procure Record on Appeal. She has 15 dates (sic) from the mailing of that notice (Nov. 5) to reply. To date, she has not responded.	
Notice of Hrg	In the meantime, proposed buyers remain interested in purchasing the property. Should the appeal be dismissed, the PA can proceed with the sale and close the estate. The PA requests continuance of at least four (4) months from the date of this status hearing.	
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FTB Notice		
		Reviewed by: skc
		Reviewed on: 11/16/15
		Updates:
		Recommendation: File 2 – Van Camp

Petition for Appointment of Guardian of the Person

Age: 11	TEMPORARY EXPIRES 11/17/15	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for:</p> <p>a. Jim Burleson (paternal grandfather) – <i>Proof of Service</i> filed 10/27/15 is not marked indicating that a copy of the <i>Petition</i> was served with the <i>Notice of Hearing</i></p> <p>b. Charlotte Burleson (paternal grandmother) – <i>Proof of Service</i> filed 10/27/15 is not marked indicating that a copy of the <i>Petition</i> was served with the <i>Notice of Hearing</i></p> <p>c. Henry Amador (maternal grandfather) – <i>service by mail</i> ok</p>
	<p>BRENDA KAY PERRY, non-relative, is Petitioner.</p> <p>Father: BRUCE BURLESON – <i>personally served on 10/09/15</i></p> <p>Mother: CONNIE AMADOR – <i>deceased</i></p> <p>Paternal grandfather: JIM BURLESON <i>served by mail on 10/20/15 with Notice of Hearing only</i></p> <p>Paternal grandmother: CHARLOTTE BURLESON – <i>served by mail on 10/20/15 with Notice of Hearing only</i></p> <p>Maternal grandfather: HENRY AMADOR</p> <p>Maternal grandmother: RACHEL MCCOLLUM – <i>Consent & Waiver of Notice filed 08/13/15</i></p> <p>Petitioner states: [see file for details].</p> <p>DSS Social Worker Irma Ramirez filed a report on 10/02/15.</p>	
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		Reviewed by: JF
		Reviewed on: 11/13/15
		Updates:
		Recommendation:
		File 3 – Burleson

4A Harley Valenzuela, Abel Williams, & Zachariah Williams (GUARD/P)

Case No. 10CEPR00154

Petitioner Vanessa Arcenia Raumaker (Pro Per)
 Petitioner Michael Ray Raumaker (Pro Per)

Petition for Termination of Guardianship

		<p>VANESSA ARCENIA RAUMAKER and MICHAEL RAY RAUMAKER, maternal aunt and uncle, are Petitioners.</p> <p>MONICA VILLALUZ, maternal grandmother, was appointed Guardian on 5/20/2010.</p> <p align="center">~Please see Petition for details~</p> <p>Court Investigator's Report was filed on 11/9/2015.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Page 4B is the Petition for Appointment of Successor Co-Guardians filed by Vanessa Raumaker and Michael Raumaker.</p> <p>1. Need proof of service by mail of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Termination of Guardianship</i>, or <i>Consent to Termination and Waiver of Notice</i>, or a <i>Declaration of Due Diligence</i>, per Probate Code §§ 1601 and 1460(a) and (b), 1510(c), and 1511, for:</p> <ul style="list-style-type: none"> • Harley Williams, paternal grandfather; • Florence Williams, paternal grandmother. 	
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	Citation			
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		<p>Reviewed by: LEG</p> <p>Reviewed on: 11/13/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 4A – Valenzuela/Williams</p>		

4B Harley Valenzuela, Abel Williams, & Zachariah Williams (GUARD/P)
Case No. 10CEPR00154

Petitioner Vanessa Arcenia Raumaker (Pro Per)
 Petitioner Michael Ray Raumaker (Pro Per)

Petition for Appointment of [Successor] Guardian

		NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
		VANESSA ARCENIA RAUMAKER and MICHAEL RAY RAUMAKER , maternal aunt and uncle, are Petitioners.	<ol style="list-style-type: none"> 1. Need proof of service by mail of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Termination of Guardianship, or Consent to Termination and Waiver of Notice, or a Declaration of Due Diligence</i>, for: <ul style="list-style-type: none"> • Harley Williams, paternal grandfather; • Florence Williams, paternal grandmother. 2. UCCJEA form filed on 9/15/2015 does not provide residence information for the last 5 years as required.
Cont. from		MONICA VILLALUZ , maternal grandmother, was appointed Guardian on 5/20/2010.	
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		~Please see Petition for details~	<p>Note Re Existing Visitation Orders: <i>Minute Order</i> dated 7/22/2010 from the Status Hearing regarding visitation states: The court orders supervised visits for Harley Williams, Sr., father, every other Saturday from 10am to 11am at the McDonalds on Blackstone and Shields, beginning 7/31/10. If Mr. Williams is more than 15 minutes late, he loses that day's visit. If he misses two consecutive visits, he will have no more visitation until he petitions the court. Visitation as to Margarita Valenzuela [mother] is to remain as previously ordered [two hours per week and visits on the children's birthdays], with the addition of one extra hour on Ms. Valenzuela's birthday of 8/7, and two extra hours on each of the minor's birthdays.</p>
		Court Investigator's Report was filed on 11/9/2015.	
			Reviewed by: LEG
			Reviewed on: 11/13/15
			Updates:
			Recommendation:
			File 4B – Valenzuela/Williams

Attorney Thomas J. Keene, of Dos Palos (for Petitioner David Brinkley)

Petition for Order to Continue to Operate Decedent's Business Under Probate Code Section 9760; and to Borrow Funds Under Probate Code Section 9760

DOD: 9/23/2010		<p>DAVID BRINKLEY, son and Administrator appointed on 8/30/2011 with Full IAEA Authority and without bond, is Petitioner.</p> <p>Petitioner states:</p> <ul style="list-style-type: none"> Under Probate Code § 9760, the personal representative of an estate may continue to operate the Decedent's business for more than 6 months following the death of the Decedent if the Court determines that it is to the advantage of the estate and in the best interest of the interested persons; Petitioner requests an order authorizing him to continue to operate Decedent's business of leasing the agricultural real property owned by the estate in return for annual payments from the Lessee, who is the Petitioner/Administrator; A spousal property petition [was granted on 11/3/2015 in Case 15CEPR00947] to remove the name of the Decedent's late husband, SHERMAN BRINKLEY (DOD 2/18/2010) from the property title; Because this is farm ground which has been under cultivation for many years, it should continue to be cultivated during the administration of the estate in order to produce income to the estate; It is in the best interests of the estate and the heirs to the estate that the Administrator be allowed to continue to operate the business while he goes through the process of selling the real property. <p align="center"><i>~Please see additional page~</i></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Report on Waiver of Account and Petition for Final Distribution, etc. was filed on 11/16/2015, and is set for hearing on 1/19/2016.</p> <p>Note: Spousal Property Order for the Estate of Sherman Brinkley, Case #15CEPR00947, filed on 11/3/2015 distributes that estate property to Petitioner as Administrator of the instant estate.</p> <p align="center">~Please see additional page~</p>		
Cont. from 090115, 092915					
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FTB Notice					
		<p>Reviewed by: LEG</p> <p>Reviewed on: 11/13/15</p> <p>Updates: 11/16/15</p> <p>Recommendation:</p> <p>File 5 – Brinkley</p>			

Declaration Under Penalty of Perjury filed by DAVID BRINKLEY on 7/22/2015 states:

- The principal asset of this estate is agricultural real property which is planted in cotton, tomatoes, alfalfa, cantaloupes, and wheat;
- He has been farming this real property since 1984, when his father, Decedent's husband **SHERMAN BRINKLEY** (DOD 2/18/2010) retired;
- His arrangement to farm this property was documented before either of his parents died;
- The Lease Agreement which he entered into with his parents (*copy attached as Exhibit A*), became effective 1/1/2008, and by its terms is to remain in effect until 1/1/2018;
- Since becoming Administrator of the estate, he has continued to farm the real property subject to the Lease, all of which is owned by the estate;
- His business, **DAVID BRINKLEY FARMS**, has continued to pay the estate the rent required under the terms of the Lease; (*please refer to Profit and Loss statements of Petitioner's business for 2011, 2012, 2013 and 2014, attached as Exhibits B, C, D and E; and crop report attached as Exhibit F*);
- It is his strong belief that it is in the best interest of the estate that the Court allow him to continue to operate the farming business with the assets of the estate at least until the current Lease expires [on 1/1/2018] or this estate is wound up, whichever occurs first.

NEEDS/PROBLEMS/COMMENTS, continued:

1. *Final Inventory and Appraisal* filed on 11/2/2015 contains the following defects:

- Filing date is **11/2/2015** of the *Final Inventory and Appraisal* demonstrating the character and value of the assets of the Estate of Charlotte Brinkley. However, those assets were technically not distributed to Charlotte's Estate until **11/3/2015**, which is the date that the *Spousal Property Order* was signed and filed into Case 15CEPR00947, distributing the assets from the Estate of Sherman Brinkley to Charlotte's Estate.
- *Attachment 2, Item 2, Stocks*, shows that **46** shares of Argo Group International Holdings Ltd. common stock is now included among the assets of Charlotte's estate. However, the *Spousal Property Order* filed 11/3/2015 (Case 15CEPR00947) distributes **55** shares of Argo Group International Holdings Ltd. common stock from the Estate of Sherman Brinkley. No explanation is provided for the **9 share deficit** in the distribution to Charlotte's estate.

Probate Status Hearing RE: Filing of the Final Account of Joyce Davis

	<p>JOYCE DAVIS, Sister, was appointed Conservator of the Person and Estate on 3/14/13.</p> <p>On 8/13/15, the Court accepted Ms. Davis' resignation as Conservator of the Estate and appointed BRUCE BICKEL as Successor Conservator of the Estate.</p> <p>At the hearing on 8/13/15, the Court set this status hearing for the filing of Ms. Davis' final account.</p> <p><u>Note:</u> On 9/23/15, pursuant to ex parte petition, the Court exonerated Ms. Davis' bond and ordered Mr. Bickel to post bond of \$502,194.24. Mr. Bickel's bond was filed on 9/30/15 and Letters issued on 10/13/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Second Report and Account Current filed 11/16/15 is set for hearing on 1/19/16.</p>
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		Reviewed by: skc
		Reviewed on: 11/16/15
		Updates:
		Recommendation:
		File 6 – Thomas

7 Raina DeLaCruz & Maricela DeLaCruz (GUARD/P) Case No. 13CEPR00160

Petitioner Juarez, Gina (pro per – mother)

Petition for Termination of Guardianship

Raina, 16	<p>GINA JUAREZ, mother, is Petitioner.</p> <p>SHEILA GALLARDO, maternal grandmother, was appointed guardian on 04/30/13. – <i>Consents and Waives Notice</i></p> <p>Father: JOHNNY MOUNCE</p> <p>Paternal grandfather: UNKNOWN Paternal grandmother: JUDY MOUNCE – <i>deceased</i></p> <p>Maternal grandfather: RICHARD DE LA CRUZ</p> <p>Sibling: MARICELA DELACRUZ – <i>Consents and Waives Notice</i></p> <p>Petitioner requests that the Guardianship of Raina be terminated.</p> <p>Court Investigator Jennifer Daniel filed a report on 09/28/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 10/05/15</u></p> <p>This Petition pertains to Raina only, Maricela has reached the age of 18 and therefore, guardianship of her has terminated by operation of law.</p>
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		Reviewed by: JF
		Reviewed on: 11/13/15
		Updates:
		Recommendation:
		File 7 – DelaCruz

8 Adriana Karyme Villalvazo Alvarado (GUARD/P) Case No. 13CEPR00385

Petitioner Jimenez, Ramona (pro per – guardian)

Petition for Termination of Guardianship

Age: 11	RAMONA JIMENEZ , maternal aunt/Guardian, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 10/05/05</u></p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Declarations of Due Diligence filed for father, paternal grandparents and maternal grandmother, if diligence is not found, need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing or Consent & Waiver of Notice</i> for: <ol style="list-style-type: none"> A. Pablo Villalvazo (father) B. Jose Villalvazo (paternal grandfather) C. Josefina Alejandres (paternal grandmother) D. Aurora Gonzalez (maternal grandmother)
Cont. from 100515	Father: PABLO VILLALVAZO – Declaration of Due Diligence filed 11/09/15 states that he was deported to Mexico	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Mother: GUADALUPE ALVARADO – acknowledged proper service at hearing on 10/05/15	
<input type="checkbox"/> Inventory		
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<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	Paternal grandfather: JOSE VILLALVAZO – Declaration of Due Diligence filed 11/09/15	
<input type="checkbox"/> Aff.Mail	Paternal grandmother: JOSEFINA ALEJANDRES – Declaration of Due Diligence filed 11/09/15	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	Maternal grandfather: MANUEL ALVARADO - deceased	
<input type="checkbox"/> Letters	Maternal grandmother: AURORA GONZALEZ – Declaration of Due Diligence filed 11/09/15	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections	Petitioner states [see file for details].	
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		Reviewed on: 11/13/15
		Updates:
		Recommendation:
		File 8 – Alvarado

Petitioner: Vanessa A. Artigas (pro per)

Petition for Termination of Guardianship

		VANESSA A. ARTIGAS , mother, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 10/5/15. As of 11/16/15 the following issues remain:</p> <ol style="list-style-type: none"> Petition does not include the names and current addresses of the father and paternal grandparents. Need proof of service of the Notice of Hearing on: <ol style="list-style-type: none"> Joseph Emmanuel Artigas (minor) Dale A. Verduzco (father) Dale A. Verduzco (paternal grandfather) Paternal grandmother.
		ANGELICA A. ARTIGAS , maternal grandmother, was appointed guardian on 10/8/13. – personally served on 9/17/15.	
Cont. from 100515		Please see petition for details.	
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			Reviewed by: KT
			Reviewed on: 11/16/15
			Updates:
			Recommendation:
			File 9 – Artigas

Guardian Robles, Joe (pro per – paternal grandfather/Petitioner)
 Guardian Robles, Sharon (pro per – paternal grandmother/Petitioner)
 Mother Williams-Ditto, Christina (pro per – Objector)

Petition for Visitation

Age: 6	SHARON ROBLES and JOE ROBLES , paternal grandparents/guardians, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	<p>Current Visitation Order, per Minute Order dated 07/13/15: mother, Christina Williams, has overnight visitation every Thursday from 6:00pm through Sunday at 6:00pm. Michael Robles, Sr. is not to reside anywhere that the minor is living.</p> <p>Petitioners request that the current visitation schedule be modified or terminated. Petitioners state that on 09/04/15, the mother dropped Michael off at school at about 6:45am before anyone was on campus. Petitioners state that no one is to be dropped off earlier than 7:30am. Petitioners further state that Michael has reported that he sometimes stays with his maternal grandmother instead of his mother during her visitation times. Also, Michael reported to Petitioners that his mother and her boyfriend got into a physical and verbal fight and that his mother suffered a broken leg from the incident. Since Ms. Williams broke her leg, the maternal grandmother has been taking him to school and caring for him on the weekends. Petitioners also allege that the mother is no longer living in her apartment and is unemployed. They state that she has returned to live in the home where she lived when Michael was removed from her care by CPS. Petitioners also report that Ms. Williams continues to contact their son, asking to co-parent with him. Petitioners state that Ms. Williams should not be contacting their son, but should be contacting them since they are the guardians.</p>	
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<input type="checkbox"/> Aff. Posting		
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<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
Continued on Page 2		
		Reviewed by: JF
		Reviewed on: 11/13/15
		Updates:
		Recommendation:
		File 10 – Robles

Declaration of Christina Williams in Opposition to Guardian's Petition for Modification of Visitation filed 11/12/15 states: On 09/04/15, she took Michael to school at about 7:00am before she went to work. She states that there was staff at the school and that he went into the office to wait there for school to begin. He was not left unattended, there were several other children there and he was safe and secure.

During her visitation time, Michael stays with her all the time and has stayed the night occasionally with his maternal grandmother, Jeanie Ditto.

Ms. Williams further states that the allegation that she broke her leg as a result of a fight with her boyfriend is untrue. Ms. Williams states that there is no fighting going on when Michael is present and that she broke her leg at a baby shower. Michael was not present when she broke her leg and neither was her boyfriend. The injury was an accident and not related to domestic violence in anyway.

Ms. Williams states that she has moved into her aunt's home. She is on temporary disability and that her mother, the maternal grandmother, has helped her by taking Michael to school because she cannot drive until she has the cast removed from her leg. She states that she intends to return to work December 1 and that she is saving to move into her own apartment when she recovers. She states that she has her own living space at her aunt's house and that it is not the home she was living in when CPS became involved. She states that that home was her father, George Williams, home and that it is also a safe environment for Michael. Ms. Williams states that the problems with that home were caused by Michael's father, Michael Robles, Sr. living there and being violent. Ms. Williams states that she stores things at her father's house, but is not living there.

Ms. Williams alleges that Michael Robles, Sr. grew up with domestic violence in his family and she did not. She states that she is concerned because this is now the home where their son is living. Ms. Williams states that guardian Sharon Robles does not support her efforts to terminate the guardianship and does not support her parenting efforts. She does not share school notices or activities that Michael is involved in and did not come to the birthday party Ms. Williams had for Michael. Instead she excludes Ms. Williams from birthday parties Ms. Robles has had for Michael in the past. Ms. Williams believes that Ms. Robles wants to raise Michael as her own child and states that she even has him sleeping on a cot in her bedroom. Ms. Williams finds this unsettling and inappropriate.

Ms. Williams states that she wants full custody of Michael. She reports that he frequently asks when his family is going to be back together. Ms. Williams states that she is furthering her education and doing everything she can to be a good parent to Michael now and in the future. She states that she has complied with all court requirements. She requests that the current visitation schedule be expanded to state that Michael shall be in her care every Wednesday at 6:00pm through Sunday at 6:00pm.

11 Daniel Kandarian (SNT) Case No. 13CEPR00796

Attorney Johnson, Mark D (for Tom Avedesian and Louise Avedesian – Co-Trustees)

Probate Status Hearing RE: Proof of Bond

Age: 62	TOM and LOUISE AVEDESIAN were appointed as Co-Trustees of the DANIEL KANDARIAN SPECIAL NEEDS TRUST on 3-28-14 with bond of \$52,514.00.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 110315	At the hearing on 10/19/2015 regarding the Petition on First Accounting and Request for Attorney Fees, the Court set this status hearing for Proof of Bond.	<p><u>OFF CALENDAR. Withdrawal of Notice of Non-Payment filed by Suretec Insurance Company on 11/05/2015.</u></p> <p>Minute Order of 11/03/2015: Counsel represents personal knowledge that the bond premium was paid because the payment came out of his own account by debit card. The Court directs Counsel to file paper proof of said payment. Counsel further represents that he has contacted the bonding company twice and left messages, but he has not received a return call.</p> <p>1. Need Proof of Bond.</p>
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 11/16/2015
		Updates:
		Recommendation:
		File 11 – Kandarian

Attorney Nancy J. LeVan (for Petitioner Gary Morris, Jr., Beneficiary)
 Attorney Jennifer Walters (for Walter A. Morris, 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

DOD: 10/19/2013	GARY MORRIS, JR. , Beneficiary, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Page 5B is a Fee Waiver Review.</p> <p>Continued from 10/6/2015. Minute Order states Ms. Walters represents that she is working on an accounting and requests additional time to complete the petition.</p> <hr/> <p>Reviewed by: LEG</p> <p>Reviewed on: 11/16/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 12A – Morris</p>
	Petitioner states:	
	<ul style="list-style-type: none"> 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]; 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; BARBARA TURNER resigned as Trustee of both Trusts, and WALTER A. MORRIS was appointed as Successor Trustee; 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; 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. <p style="text-align: center;">~Please see additional page~</p>	
Cont. from 100615		
<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/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		

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:

- *Petition* was filed using a fee waiver, which is currently pending. The **\$435.00** filing fee is appropriately payable from Trust assets. *Declaration of Clerical Error and Omissions* filed 10/2/2015 states Petitioner agrees that a filing fee should be paid by Walter Morris, Trustee of the **GARY F. MORRIS, SR., 2013 TRUST**; however, Walter Morris is not communicating with the beneficiary, Gary Morris, Jr., his attorney, nor the Successor Trustee of the **GARY F. MORRIS, JR., TRUST**; the beneficiary has no access to funds of the Trust.
- *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%.
- *Declaration of Clerical Error and Omissions* filed 10/2/2015 attaches as *Exhibit B* a copy of the bond renewal that was mailed to Walter Morris, and states it is unknown what Walter Morris did with it.

Attorney Nancy J. LeVan (for Petitioner Gary Morris, Jr.)

Fee Waiver Review - Confidential

DOD: 10/19/2013			NEEDS/PROBLEMS/COMMENTS:
Cont. from 100615			
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: LEG	
		Reviewed on: 11/16/15	
		Updates:	
		Recommendation:	
		File 12B – Morris	

Petition for Visitation

		<p>SALINA GUTIERREZ, mother, is petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
		<p>NORMA LEYVA, paternal grandmother, was appointed successor guardian on 9/24/14.</p>	
<p>Cont. from 092115, 100515</p>		<p>Please see petition for details.</p>	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	N/A	
<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		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	X	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			<p>Reviewed by: KT</p>
			<p>Reviewed on: 11/16/15</p>
			<p>Updates:</p>
			<p>Recommendation:</p>
			<p>File 13A – Ortiz</p>

Guardian: Norma Irene Leyva (pro per)

Petitioner: Selina Gutierrez (pro per)

Petition for Termination of Guardianship

	SELINA GUTIERREZ , mother, is petitioner.		NEEDS/PROBLEMS/COMMENTS: 1. Need proof of service of the Notice of Hearing on: a. Loretta Gutierrez (maternal grandmother) – served with the notice of hearing dated 10/5/15 on 10/19/15 – after the hearing.
	NORMA LEYVA , paternal grandmother, was appointed successor guardian of the minors on 9/24/14.		
	Please see petition for details.		
	Court Investigator Report filed on 9/28/15.		
	Court Investigator Report filed on 11/12/15		
Cont. from 100515			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
	Order	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: KT
			Reviewed on: 11/16/15
			Updates:
			Recommendation:
			File 13B – Ortiz

Probate Status Hearing RE: Sale of the Property

DOD: 12/19/14	PUBLIC GUARDIAN , was appointed Conservator of the Estate on 07/25/14.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need status update regarding the sale of the real property in the estate matter (15CEPR00251) and payment of fees that were waived.</p> <p>Note: The Public Guardian paid \$539.00 on 11/12/15, which was payment for its First and Final Account and Certified Copies, charges from 06/16/15.</p> <p>It appears that that filing fees of \$495.00 are still owing for the initial Petitions for general and temporary conservatorship.</p>
	The Conservatorship matter was initiated by Maria Begoinia Brownson using a fee waiver. As a result of the fee waiver, filing fees were waived totaling \$495.00 (\$60.00 for the temporary petition and \$435.00 for the general petition).	
Cont. from	PUBLIC GUARDIAN/Conservator filed its First and Final Account and Report of Conservator on 06/15/15.	
Aff.Sub.Wit.	Minute Order from hearing on First and Final Account dated 07/21/15, set this matter for status regarding the Sale of Property and states: The filing fees are to be paid from the net proceeds of the estate matter. If the fees are paid by at least two court days prior to the status hearing, then no appearance is necessary on 11/17/15.	
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 on: 11/13/15
		Updates:
		Recommendation:
		File 14 – Garcia

The Decedent was an occupant of the home as a tenant, paying monthly sum to petitioner and her husband, and Decedent was planning to deed the real property to petitioner and her husband prior to death.

The following facts are given in support of the claim of the petition and her husband:

- In 2008, the Decedent, J. Jesus Rocha, aka Jesus Rocha-Gaitan, urged petitioner and her husband to buy a house. He offered to take out a loan on the house as he wanted to help petitioner and her husband qualify for a loan because neither of them had valid social security numbers nor did they have good credit;
- Jesus Rocha signed as buyer on three different offers and finally on the purchase of the home that petitioner and her husband reside.
- All buyer's charges in escrow were paid by Gonzalo Sandoval and petitioner from their wages and sale of a car. Jesus Rocha made no personal financial contributions towards the purchase of the real property. However, he did obtain from the IRS an \$8,000 refund as a first time buyer. He kept all of that money. The buyer was at all times shown as Jesus Rocha.
- The loan to buy the property was arranged by Resource Lenders, and all payments to current date have been paid by Gonzalo Sandoval and Maria Ines Gonzalez. The source of all monies to make these payments were their wages. The decedent did not contribute to these payments and there was never any intention by decedent, on the one hand, and petitioner and her husband, on the other hand that the decedent would so contribute.
- There was a lender requirement that the named buyer, Jesus Rocha have three months bank deposits of \$3,000, and that was arranged by petitioner and her husband giving \$3,000 to a straw-man to deposit in Jesus Rocha's bank account at Bank of America.
- Neither Gonzalo Sandoval nor petitioner could withdraw from Jesus Rocha's bank account.
- From 2007-2012, Jesus Rocha paid petitioner and her husband \$250 per month for room and board. Starting in 2013, he paid them \$300 per month. He executed an affidavit dated August 12, 2013 to attest that he paid petitioner and her husband for room and board at 1206 King Street.
- It was always understood between petitioner and her husband and the decedent that the decedent held no interest in the property at 1206 King Street, Parlier, California.
- In addition to the forgoing facts, filed in this proceeding on February 3, 2015, is the Declaration of Estela M. Lopez. Estela M. Lopez was the agent for the seller of the real property. She was familiar with Jesus Rocha as she had handled his tax returns for several years. In said declaration, in paragraph 3, Lines 20-24, Estela M. Lopez states: "When Maria Ines Gonzalez, and her husband, Gonzalo Sandoval, wanted to buy the property at 1206 King Street, Parlier, Ca., Mr. Rocha came to me to complete a form. I asked him why he wanted to fill out the form, he said he was going to help Maria Ines Gonzalez and her husband, Gonzalo Sandoval, purchase the property by using his name and credit. He said that he would have no ownership in the property." Said declaration was signed under penalty of perjury under the laws of the State of California.

Please see additional page

- Also in addition to the foregoing stated facts, filed in this proceeding on December 11, 2014, is the Declaration of Evangelina Sanchez-Mayoral. Evangelina Sanchez-Mayoral is the sister of Irene Sanchez-Mayoral. There are multiple statements within this document which support the fact that she had knowledge of the decedent's plan, and had discussed the plan with the decedent to purchase the real property referenced in this petition in his name but for the benefit of petitioner and her husband. At paragraph 1, Line 22-25, Evangelina Sanchez-Mayoral stated "I had been fully aware of the plan of my deceased brother-in-law to help Gonzalo and Maria Ines to purchase the house by showing him as the buyer, although he never paid anything for the house or the escrow or the loan to purchase the house. The decedent and I spoke about this arrangement between him and them." She continues on Pages 1 and 2, starting at line 26 on page 1 and continued through page 2, lines 2-5 stating, "My deceased brother-in-law had offered me the same proposition to buy a house first, and said that I chose not to do so, he had already spoken to Gonzalo and Maria Ines to help them buy a house by using his name. We knew that neither Gonzalo nor Maria Ines could get a loan and buy the home because they had no valid social security numbers and were illegally present in the United States. I told my brother-in-law to go ahead and help them, and I past [sic] on the offer." Said declaration was signed under penalty of perjury under the laws of the State of California.

Wherefore, petitioner prays for an order as follows:

1. Directing the personal representative to transfer the real property commonly described as 1206 Kings, Parlier, California, to petitioner and her husband, and to execute any documents necessary in order to fully complete the transfer of this property;
2. For such other orders as the court deems proper.

Objection to Petition for Order Directing Personal Representative to Transfer Property, Petition for Order Confirming Property as an Asset of the Estate and for Damages filed by Irene Sanchez-Mayoral on 11/03/2015 states she is the surviving spouse of the decedent, and objects to the petition.

Response/Answer to Petition

1. Respondent denies that the Petitioner Maria Ines Gonzalez is interested in the estate of decedent, and denies that Petitioner has a right in property currently subject to administration in the estate.
2. Respondent admits that decedent J. Jesus Rocha, died on 06/24/2014, and held title to real property located in Fresno County, commonly known as 1206 King, Parlier, Ca.
3. Respondent denies that the property referenced belongs to Petitioner and her husband and denies that decedent was holding title and/or the loan as constructive trustee for the benefit of Petitioner and her husband. Respondent admits that the decedent occupied the home, but denies that he occupied the home as a tenant.
4. Respondent denies that all payments to "current date" have been paid by Gonzalo Sandoval and Maria Ines Gonzalez.

Respondent requests that the petition be denied, and request affirmative relief as heinafter set forth.

Please see additional page

Petition for Confirmation of Property as an Asset of the Estate Probate Code §850(a)(2)(c)

Respondent was married to J. Jesus Rocha, aka J. Jesus Rocha Gaytan (Decedent) in 1987 in Mexico and remained married to him until his death on 06/24/2014. In 2006, Decedent came to the United States and eventually settled in the Selma area. In 2010, Decedent acquired a residence in Fresno County, at 1206 King St. Parlier, Ca. Title was taken in the name of Jesus Rocha-Gaytan, an unmarried man, even though at all times Decedent and Respondent were married. At all times Respondent was kept informed of her husband's actions and his acquisition of the residence. Decedent stated that he was acquiring a residence in the United States to provide for Respondent and their children. Decedent was back and forth between California and the residence of Respondent and Decedent in Colima, Mexico; he was able to obtain higher wages in California. Respondent is employed in Mexico as a licensed Attorney. Decedent had previously been living with Respondent's nephew, Gonzalo Sandoval Sanchez ("Gonzalo") in Parlier; after Decedent acquired the residence at 1206 King St. Gonzalo and his wife Maria Ines Gonzalez ("Ines") moved into the residence with him. Decedent returned to Mexico for medical treatment. Following treatment was back and forth between the residence of Colima Mexico and Parlier. He died unexpectedly on June 24, 2014 in Mexico. Following Decedent's death, Respondent contacted Chase Bank, the holder of the mortgage. Respondent provided them documents confirming her status as the spouse of J. Jesus Rocha. Respondent is informed and believes no probate would be necessary because the value of the residence was less than \$150,000.00. Attached as Exhibit B is an Inventory and Appraisal which was obtained in 11/14/2014, in which Rick P. Smith, probate referee, appraised the residence at \$125,000.00. Respondent provided the bank with necessary paperwork, and was acknowledged as next of kin. She was subsequently advised that a package of documents was mailed to Decedent's "estate" to update personal contact information, but is informed and believe Ines and/or Gonzalo opened the packet and provided their personal information to the bank. Following that event Respondent was unable to speak with Chase Bank, which then held the mortgage. In July and August 2014 Respondent was in Fresno County and was advised by Gonzalo and Ines that the payments on the residence were behind. Respondent went to Chase Bank in Sanger, California and was informed that the loan was in early stages of foreclosure due to non-payment, which was two months behind, and approaching a third month. Respondent paid \$1,090.00 from personal funds, to bring the mortgage current through August 2014. On 09/20/2014 Respondent went to the residence to request her husband's mail; Gonzalo refused to grant her access to the house, told her the house was no longer Respondent's house, and that the bank had transferred the property to Ines' name. Respondent knows that to be incorrect.

At all times since the acquisition of the residence, Respondent is informed and believes that Decedent, her husband received a rental amount from Ines and Gonzalo for their share of cost of the residence. Decedent told Respondent that sometimes the payments on the mortgage were late because Ines and Gonzalo were late in making their payments to him. He worked the graveyard shift, and Ines did not work; he would have Ines make the payments on his behalf and give her the money to do so. They also split the cost of utility bills; payments were sometimes late because Ines and Gonzalo did not have the money to make their share of the payments.

Decedent was legally blind. He was unable to read, speak or understand English, and relied on others to read documents and translate for him. Respondent is informed and believes that Ines and Gonzalo took advantage of him, and that the declaration that he signed was something he was neither able to read, nor was he advised of the meaning of it.

Decedent had two vehicles registered to him at 1206 King Street in Parlier. Respondent is informed and believes that these vehicles were transferred to Ines while he was in Mexico. At all times Decedent's death, Ines Gonzalez and Gonzalo Sandoval have been in possession of the residence. Respondent is informed and believe they have made payments toward the mortgage of the residence. Respondent is further informed and believes that the rental value of the residence is higher than the amount they are paying towards the mortgage and other expenses they may be paying.

Request for Damages

Respondent alleges that the actions of petitioner Maria Ines Gonzalez and/or her spouse Gonzalo Sandoval, in taking, appropriating and/or disposing of property belonging to the decedent was done in bad faith, and/or by the use of undue influence in that at all times J. Jesus Rocha was blind, could not understand or speak English, and relied on petitioner Maria Ines Gonzalez and/or her spouse, Gonzalo Sandoval to advise him for all matters regarding the acquisition of the property. Respondent believes that the actions herinabove described were intentionally done by Ines and/or Gonzalo, to the detriment of the decedent, and with an intent to deprive him of his property.

At the time of such actions, Maria Ines Gonzalez and/or her spouse Gonzalo Sandoval, knew or should have known that decedent J. Jesus Rocha was relying on them to act in his best interest, with respect to the acquisition and continued occupancy of the property. As a result of their wrongful withholding of the assets belonging to the decedent, the estate is entitled to "double damages" pursuant to section 859 of the California Probate code.

Wherefore Respondent Irene Sanchez-Mayoral prays:

1. Her objections to the petition of Maria Ines Gonzalez be sustained, and the court determine that neither Maria Ines Gonzalez nor Gonzalo Sandoval have any interest in the real property at 1206 King Street, Parlier California;
2. For an order determining that said property is an asset of the estate subject to administration herein;
3. That the estate recover the vehicles or the value of the vehicles standing decedent's name which were wrongfully taken by or transferred by petitioner Maria Ines Gonzalez and/or her spouse Gonzalo Sandoval, together with any other assets of Decedent or of the Estate, according to proof;
4. For "double damages" for the wrongful taking of decedent's property as prescribed under section 859 of the Probate Code;
5. For Respondent's reasonable attorneys fees and costs incurred in opposing the petition for Maria Ines Gonzalez and bringing this action;
6. For additional damages in an amount according to proof , and
7. For such other and further relief as the Court may deem proper.

Objection to Respondents' Irene Sanchez-Mayoral and Guadalupe Rocha Petition for Confirmation of Property as An Asset of the Estate filed on 11/10/2015.

Report of Sale and Petition for Order Confirming Sale of Real Property

DOD: 12/4/14	JOHN PARKER is Executor/petitioner.		<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> #3a of the petition indicates the property was appraised at \$280,000.00 however the inventory and appraisal filed on 6/4/15 lists the value of the property at \$350,000.00. Need reappraisal for sale. Probate Code § 10309(a)(3) requires the sales price to be within 90% of the appraised value of the property. Need proof of service of the Notice of Hearing on the purchasers Steven and Julia McShea pursuant to Probate Code § 10308(c). Need proof of service of the Notice of Hearing along with a copy of the petition on John F. Garland pursuant to the Request for Special Notice filed on 6/26/15.
	Sale price	- \$260,000.00	
	Overbid	- 273,500.00	
	Appraisal	- \$350,000.00	
Cont. from	Property	- 21258	
<input type="checkbox"/> Aff.Sub.Wit.	Auberry Rd. Clovis		
<input checked="" type="checkbox"/> Verified	Publication	- N/A. Will authorized sale of real proerpty.	
<input checked="" type="checkbox"/> Inventory	Buyers	- Steven and Julia McShea TTEE of the SJM Family Trust.	
<input type="checkbox"/> PTC	Broker	- \$15,600.00 (6% - payable to Kevin Christiansen)	
<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			
<input checked="" 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: 11/16/15			
Updates:			
Recommendation:			
File 16 – Stocchetti			

Petition for Settlement of First and Final Account and Final Distribution, and For Order Fixing and Allowing Compensation for All Services Rendered

DOD: 01/09/15	JAMES W. MYERS , Executor, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. The Order does not comply with Local Rule 7.6.1(C) - All orders distributing property and orders settling accounts shall contain a statement as to the balance of the estate on hand, specifically noting the amount of cash included in the balance.</p> <p>Note: The Order shall also reflect the refund of \$615.00 to the estate from the attorney's trust account so that all assets available for distribution are stated.</p>
	Account period: 01/08/15 – 08/17/15	
	Accounting: \$410,056.58	
	Beginning POH: \$400,587.00	
	Ending POH: \$320,425.53 (all cash)	
Cont. from	Executor: waived	
<input type="checkbox"/> Aff.Sub.Wit.	Attorney: \$6,000.00 (less than statutory)	
<input checked="" type="checkbox"/> Verified	CPA: \$500.00 (to Thomas Edginton, CPA for preparation of the accounting)	
<input checked="" type="checkbox"/> Inventory	Costs: +\$615.00 (refund of amount remaining in attorney trust account for costs. Initial deposit of \$2,000.00 less \$1,385.00 for filing fees, publication, probate referee)	
<input checked="" type="checkbox"/> PTC	Closing: \$500.00	
<input checked="" type="checkbox"/> Not.Cred.	Distribution, pursuant to Decedent's will, is to:	
<input checked="" type="checkbox"/> Notice of Hrg	Anthony J. Myers: \$39,255.07	
<input checked="" type="checkbox"/> Aff.Mail w/	Jeffrey A. Myers: \$39,255.06	
Aff.Pub.	Amanda E. Meddock: \$39,255.07	
Sp.Ntc.	Cody J. Schroeder: \$13,085.02	
Pers.Serv.	Kyle Schroeder: \$13,085.02	
Conf. Screen	Krista Khorschidchehr: \$13,085.03	
Letters 04/01/15	Melissa Ankeny: \$78,510.13	
Duties/Supp	Kelley J. Tran: \$78,510.13	
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: 11/16/15
Updates:
Recommendation:
File 17 – Reed

First and Final Report of Administrator and Petition for Its Settlement, for Allowance of Attorney Fees and Final Distribution Upon Waiver of Accounting

DOD: 3/14/15	AMANDA K. MCLANE , Administrator, is petitioner.		NEEDS/PROBLEMS/COMMENTS: 1. Petition states all heirs have waived an accounting. Need waivers of account from: a. Charles E. McLane b. Michael A. McLane 2. Petition states the date of death is March 14, 2015; however inventory and appraisal shows the date of death as May 14, 2015. The property must be appraised as of the date of death. Probate Code §8802. 3. Need Allowance or Rejection of Creditor's Claim filed by the Franchise Tax Board. California Rules of Court, Rule 7.401 4. Need proof of service of the Notice of Hearing along with a copy of the Petition on the Franchise Tax Board, pursuant to their request for Special Notice. 5. Proposed distribution appears incorrect. Petition lists the property on hand at \$97,703.84. After deducting attorney fees and costs totaling \$4,986.00 there is \$92,717.84 available for distribution. \$92,717.84 divided by 3 would provide distribution of \$30,905.95 to each beneficiary.
	Accounting is waived?		
Cont. from	I & A	- \$275,000.00	
<input type="checkbox"/> Aff.Sub.Wit.	POH	- \$ 97,703.84	
<input checked="" type="checkbox"/> Verified	Administrator	- waives	
<input checked="" type="checkbox"/> Inventory	Attorney	- \$4,500.00	
<input checked="" type="checkbox"/> PTC	(less than statutory)		
<input checked="" type="checkbox"/> Not.Cred.	Attorney costs	- \$486.00	
<input checked="" type="checkbox"/> Notice of Hrg	(filing fee and certified copies)		
<input checked="" type="checkbox"/> Aff.Mail	Distribution, pursuant to intestate succession, is to:		
<input type="checkbox"/> Aff.Pub.	Charles E. McLane	- \$29,924.99	
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.	Michael A. McLane	- \$29,924.99	
<input type="checkbox"/> Conf. Screen	Amanda K. McLane	- \$29,924.99	
<input checked="" type="checkbox"/> Letters	6/4/15		
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input checked="" type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input checked="" type="checkbox"/> FTB Notice			
Reviewed by: KT			
Reviewed on: 11/16/15			
Updates:			
Recommendation:			
File 18 - McLane			

20 Patsy Lucille Barnes (Estate) Case No. 15CEPR00481

Attorney Arthur, Susan K. (for Kevin L. Barnes – Executor)

Probate Status Hearing RE: Filing of the Inventory and Appraisal

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR. Final Inventory and Appraisal filed 07/06/2015.</u></p>
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input 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	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: LV
		Reviewed on: 11/13/2015
		Updates:
		Recommendation:
		File 20 – Barnes

Amended Petition to Determine Succession to Real Property

DOD: 4/24/15	JOHN DANIEL HERNANDEZ, JR., Grandson, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	40 days since DOD	
	No other proceedings	
Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	I&A: \$130,000.00 (real property located at 5310 Carmel St., in Del Rey, CA)	
<input checked="" type="checkbox"/> Inventory		
PTC		
Not.Cred.	Will dated 1/12/15 devises the decedent's house at 5310 Carmel St., Del Rey, CA, to Petitioner.	
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	W Petitioner requests Court determination that the real property passes to him pursuant to the decedent's will.	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 11/16/15
		Updates:
		Recommendation: SUBMITTED
		File 21 – Hernandez

Petition for Appointment of Probate Conservator of the Person

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 09/16/15. Continued from 10/5/15. The following issues remain noted: 1. The Capacity Declaration does not support dementia powers. 2. Petitioner did not include the mandatory Attachment Requesting Special Orders Regarding Dementia (GC-313) to specify whether she is seeking dementia medication and/or placement powers. As such, the proposed Conservatee and the relatives were served with a petition that does not include this information. If Petitioner wishes to pursue dementia powers, the Court may require this attachment to be filed and served.	
Cont. from 100515				
	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			
			Reviewed by: skc	
			Reviewed on: 11/16/15	
			Updates:	
			Recommendation:	
			File 22 – Amey	

Petitioner Ashley Flores (Pro Per Petitioner)

Petition for Appointment of Guardian of the Person

Age: 11 years		<p align="center">NO TEMPORARY REQUESTED</p> <p>ASHLEY FLORES, maternal aunt, is Petitioner</p> <p align="center">~Please see Petition for details~</p> <p>Court Investigator's Report was filed on 11/6/2015.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of personal service of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian</i>, or <i>Consent to Appointment of Guardian and Waiver of Notice</i>, or a <i>Declaration of Due Diligence</i>, for: <ul style="list-style-type: none"> • Leslie Myatt, mother; • Johnny Sanchez, father. 3. Need proof of service by mail of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian</i>, or <i>Consent to Appointment of Guardian and Waiver of Notice</i>, or a <i>Declaration of Due Diligence</i>, for: <ul style="list-style-type: none"> • Paternal grandparents; • Dale White, maternal grandfather; • Sheley White, maternal grandmother. 4. <i>UCCJEA</i> form filed on 9/15/2015 does not provide residence information for the last 5 years as required. 	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			X
<input type="checkbox"/>	Aff.Mail			X
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			X
<input checked="" type="checkbox"/>	Conf. Screen			
<input 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: 11/16/15		
		Updates:		
		Recommendation:		
		File 23 – Sanchez		

Petition for Appointment of Guardian of the Person

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> The proof of personal service attached to the Notice of Hearing filed 10/26/15 is blank at #6 and does not contain the server's information re service on the maternal grandparents. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: <ul style="list-style-type: none"> - Jose Alisardava (Father) Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: <ul style="list-style-type: none"> - Paternal Grandfather - Paternal Grandmother - Siblings age 12 or older 	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			W
✓	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: 11/16/15	
			Updates:	
			Recommendation:	
			File 24 – Becerra	

Petition for Appointment of Probate Conservator

Age: 46	<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS:
	ASHLEY FLORES , daughter, is Petitioner and requests appointment as Conservator of the Person with medical consent powers.	If the petition goes forward, the following items need to be addressed:
Cont. from	Petitioner states [see file for details].	1. Need Notice of Hearing.
<input type="checkbox"/> Aff.Sub.Wit.	Court Investigator Samantha Henson filed a report on 11/12/15.	2. Need Citation.
<input checked="" type="checkbox"/> Verified		3. Need proof of personal service at least 15 days before the hearing of <i>Citation</i> with a copy of the Petition for Appointment of Conservator of the Person on the proposed conservatee.
<input type="checkbox"/> Inventory		4. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the Petition for Appointment of Conservator of the Person for all relatives within the second degree.
<input type="checkbox"/> PTC		5. Need receipt for watching conservatorship video.
<input type="checkbox"/> Not.Cred.		6. Need doctor's declaration supporting medical consent powers.
<input type="checkbox"/> Notice of Hrg x		
<input type="checkbox"/> Aff.Mail x		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv. x		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt 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		
<input type="checkbox"/> Citation x		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 11/16/15
		Updates:
		Recommendation:
		File 25- White

Petition for Appointment of Probate Conservator of the Person

Age: 59		<p align="center"><u>NO TEMPORARY REQUESTED</u></p> <p>CECILIA ALFARO, daughter, is Petitioner and request appointment as Conservator of the Person with medical consent powers.</p> <p>Voting rights affected.</p> <p>Petitioner states [see file for details].</p> <p>Court Investigator Charlotte Bien filed a report on 11/03/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>See page 27 for related petition regarding Mr. Martinez' wife, Maria Contreras de Martinez.</p> <p>Voting rights affected, need Minute Order.</p> <p>Court Investigator advised rights on 10/28/15.</p> <ol style="list-style-type: none"> Item 8 of the petition does not appear to list all of the proposed conservatee's relatives within the second degree (parents, grandparents, children, grandchildren and brothers and sisters). Only wife and children are listed and have been provided notice. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Conservator of the Person</i> for <u>all relatives within the second degree.</u> Need Citation. Need proof of personal service at least 15 days before the hearing of <i>Citation</i> with a copy of the <i>Petition for Appointment of Conservator of the Person</i> on the proposed conservatee. 	
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.			x
<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 type="checkbox"/>	Citation	x		
<input type="checkbox"/>	FTB Notice			
<p>Reviewed by: JF</p> <p>Reviewed on: 11/16/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 26 – Martinez</p>				

Petitioner Alfaro, Cecilia (pro per – daughter)

Petition for Appointment of Probate Conservator of the Person

Age: 61	<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS:
	CECILIA ALFARO, daughter, is Petitioner and requests appointment as conservator of the person with medical consent powers.	Voting rights affected, need Minute Order.
		Court Investigator advised rights on 10/28/15.
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory	Petitioner states [see file for details].	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Court Investigator Charlotte Bien filed a report on 11/03/15.	
<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.		x
<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		
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		
		Reviewed by: JF
		Reviewed on: 11/16/15
		Updates:
		Recommendation:
		File 27 – Contreras De Martinez

28 Sherri Melissa Zeno (Estate) Case No. 15CEPR01022

Attorney Bagdasarian, Gary G. (for Virginia Rings-Couch – Administrator)

Petition for Letters of Administration with IAEA and with Limited Authority

DOD:			NEEDS/PROBLEMS/COMMENTS:
			<p><u>Continued to 12/07/2015 at the request of Counsel.</u></p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input 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		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed on: 11/16/2015	
		Updates:	
		Recommendation:	
		File 28 – Zeno	

