



## 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.

Petitioner: Jennie Cynthia Reyna (Pro per – Sister)

Petition for Appointment of Successor Probate Conservator of the Person

		<p>JENNIE CYNTHIA REYNA, sister, is petitioner and requests appointment as successor conservator with medical consent powers.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Court Investigator Advised Rights 9/20/2016.</b></p> <p><b>Continued from 10/20/2016.</b> As of 11/10/2016, the following issue remains:</p> <ol style="list-style-type: none"> <li>1. Item 5 of proof of service of <i>Notice of Hearing</i> filed 10/5/2016 does not indicate that a copy of the petition was served with the notice, as required pursuant to Probate Code 2683(a), on the following:                     <ol style="list-style-type: none"> <li>a. Maria D. Reyna (mother)</li> <li>b. Dorothy Guzman (sister)</li> <li>c. Juan R. Reyna (brother)</li> </ol> </li> </ol> <p><b>Note:</b> Per CI report, petitioner states conservatee's name was misspelled on the initial petition, and should have been <u>SONIA</u> (not Sonya). Court may wish to do a true-name finding.</p>
Cont. from 102016		<p><i>Please see petition for details.</i></p>	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w/o	
	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		
			<p><b>Reviewed by:</b> SEF</p> <p><b>Reviewed on:</b> 11/10/2016</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 1- Reyna</b></p>

**3 Jenna Rae Kugelman, Isaac Earl Shea (GUARD/P) Case No. 11CEPR01127**

Petitioner: Catalina Victoria Shea (Pro per – Paternal aunt)

**Petition for Appointment of Temporary Guardian of the Person  
(as to Isaac Earl Shea Only)**

	<b>TEMPORARY EXPIRES 11/17/2016</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	CATALINA VICTORIA SHEA, paternal aunt, is petitioner.	<b>This petition is for ISAAC EARL SHEA only.</b> (Ronald and Sharon Kugelman, paternal grandparents, were appointed co-guardians of Jenna Rae Kugelman on 2/28/2012.)
		<b>Please see related page 24.</b> Petitioner is also filing for guardianship for half-sibling, Dominic Shea, in Case no. 16CEPR00977.
Cont. from		<b>Minute order dated 10/3/2016</b> from temporary hearing states objections need to be filed and served on anyone legally entitled to notice 15 days before the 11/17/2016 hearing.
Aff.Sub.Wit.		As of 11/10/2016, no objections have been filed with the Court.
Verified	<i>Please see petition for details.</i>	1. Need proof of service at least 15 days before the hearing of the <i>Notice of Hearing</i> with a copy of the petition on <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence for:
Inventory		a. Matthew Shea (sibling) - <i>if 12 years or older</i>
PTC		
Not.Cred.		<b>Court Investigator to provide:</b>
Notice of Hrg		• Investigation report
Aff.Mail		• Clearances
Aff.Pub.		
Sp.Ntc.		<b>Reviewed by:</b> SEF
Pers.Serv.		<b>Reviewed on:</b> 11/10/2016
Conf. Screen		<b>Updates:</b>
Letters		<b>Recommendation:</b>
Duties/Supp		<b>File 3- Shea</b>
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Probate Status Hearing RE: Proof of Additional Bond

		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>OFF CALENDAR.</b> Additional bond filed on 10/31/16.</p>
<b>Cont. from</b>		
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	
<input type="checkbox"/>	<b>Verified</b>	
<input type="checkbox"/>	<b>Inventory</b>	
<input type="checkbox"/>	<b>PTC</b>	
<input type="checkbox"/>	<b>Not.Cred.</b>	
<input type="checkbox"/>	<b>Notice of Hrg</b>	
<input type="checkbox"/>	<b>Aff.Mail</b>	
<input type="checkbox"/>	<b>Aff.Pub.</b>	
<input type="checkbox"/>	<b>Sp.Ntc.</b>	
<input type="checkbox"/>	<b>Pers.Serv.</b>	
<input type="checkbox"/>	<b>Conf. Screen</b>	
<input type="checkbox"/>	<b>Letters</b>	
<input type="checkbox"/>	<b>Duties/Supp</b>	
<input type="checkbox"/>	<b>Objections</b>	
<input type="checkbox"/>	<b>Video Receipt</b>	
<input type="checkbox"/>	<b>CI Report</b>	
<input type="checkbox"/>	<b>9202</b>	
<input type="checkbox"/>	<b>Order</b>	
<input type="checkbox"/>	<b>Aff. Posting</b>	
<input type="checkbox"/>	<b>Status Rpt</b>	
<input type="checkbox"/>	<b>UCCJEA</b>	
<input type="checkbox"/>	<b>Citation</b>	
<input type="checkbox"/>	<b>FTB Notice</b>	
		<b>Reviewed by:</b> KT
		<b>Reviewed on:</b> 11/9/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 4- Jean</b>

Probate Status Hearing RE: Filing of the Next Account

		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>OFF CALENDAR.</b> Second Account filed and set for hearing on 1/10/17.</p>
<b>Cont. from</b>		
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	
<input type="checkbox"/>	<b>Verified</b>	
<input type="checkbox"/>	<b>Inventory</b>	
<input type="checkbox"/>	<b>PTC</b>	
<input type="checkbox"/>	<b>Not.Cred.</b>	
<input type="checkbox"/>	<b>Notice of Hrg</b>	
<input type="checkbox"/>	<b>Aff.Mail</b>	
<input type="checkbox"/>	<b>Aff.Pub.</b>	
<input type="checkbox"/>	<b>Sp.Ntc.</b>	
<input type="checkbox"/>	<b>Pers.Serv.</b>	
<input type="checkbox"/>	<b>Conf. Screen</b>	
<input type="checkbox"/>	<b>Letters</b>	
<input type="checkbox"/>	<b>Duties/Supp</b>	
<input type="checkbox"/>	<b>Objections</b>	
<input type="checkbox"/>	<b>Video Receipt</b>	
<input type="checkbox"/>	<b>CI Report</b>	
<input type="checkbox"/>	<b>9202</b>	
<input type="checkbox"/>	<b>Order</b>	
<input type="checkbox"/>	<b>Aff. Posting</b>	
<input type="checkbox"/>	<b>Status Rpt</b>	
<input type="checkbox"/>	<b>UCCJEA</b>	
<input type="checkbox"/>	<b>Citation</b>	
<input type="checkbox"/>	<b>FTB Notice</b>	
		<b>Reviewed by:</b> KT
		<b>Reviewed on:</b> 11/9/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 5- Alvarez</b>

**6 Eli Carl Alvarado (GUARD/P)**

**Case No. 14CEPR00677**

Guardian: Wally Lupe Alvarado (pro per)

Guardian: Clara Mendoza Martinez (pro per)

Guardian: Andrea Martinez-Lucero (pro per)

Guardian: Phillip Lucero (pro per)

Attorney: Rick D. Banks (for Petitioner/mother Sarah B. Alvarado)

**Probate Status Hearing RE: Additional Visitation Orders**

	<b>SARAH ALVARADO</b> , mother, petitioned the court to modify the visitation.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>	<b>ANDREA LUCERO, PHILLIP LUCERO</b> , non-relatives, <b>WALLY L. ALVARADO</b> , maternal grandfather, and <b>CLARA MARTINEZ</b> , maternal grandfather's [ex] girlfriend, were appointed co-guardians on 11/18/14	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>	<b>Minute order dated 9/22/16 states</b> the Court orders the current visitation remain in full force and effect. Later and off the record the court set this matter for status.	
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> KT
		<b>Reviewed on:</b> 11/10/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 6- Alvarado</b>

<b>DOD: 08/01/2013</b>	<b>PRIMAVERA DAMME</b> , daughter, was appointed Executor with Full IAEA with bond of <b>\$175,000.00</b> on 4/14/2015.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order of 08/18/2016: Counsel represents that the petition will be filed within 120 days; she requests the additional time due to her client being out of state and new information that has come to light with regard to the assets. The Court orders that if the petition is not filed by 11/17/2016, a verified status report must be filed.</b></p> <p>1. Need First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
	Receipt of Bond filed in the amount of \$175,000.00.	
<b>Cont. from 071416, 081816</b>	Letters issued on 09/08/2015.	
<b>Aff.Sub.Wit.</b>	Final Inventory and Appraisal filed 10/14/2015 shows an estate valued at \$149,566.37.	
<b>Verified</b>		
<b>Inventory</b>	Final Inventory and Appraisal filed 08/15/2016 shows an estate valued at \$142,250.00.	
<b>PTC</b>	<b>Minute Order dated 4/14/2015</b> set this Status Hearing for the filing of the First and Final Account.	
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> LV
		<b>Reviewed on:</b> 11/10/2016
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 7- Valencia</b>

Attorney: Gary Bagdasarian (Petitioner/Court Appointed Attorney for Conservatee)

Attorney: J. David Petrie (Co-Counsel of Gary Bagdasarian)

Attorney: Heather H. Kruthers (for Public Guardian, Conservator)

**Ex Parte Application for First Amended Order Approving Compensation of Attorneys for Representation of Conservatee.**

		<p><b>GARY BAGDASARIAN and J. DAVID PETRIE</b>, attorneys, are petitioners.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
		<p><b>Petitioners state</b> the Court entered its Order Approving Compensation of Attorneys for Representation of Conservatee on 9/15/16.</p>	
<b>Cont. from</b>		<p>As reflected in the Petition for Compensation for Representation of Conservatee, the services rendered by J. David Petrie as trial counsel were from August 13, 2015 through March 25, 2016. However, attached as Exhibit "A" are additional services rendered by J. David Petrie from April 4, 2016 through May 17, 2016 <b>totaling \$2,470.00</b> which were inadvertently left out of the Petition.</p>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>	<p><b>Therefore, request is made</b> that a First Amended Order Approving Compensation of Attorneys for Representation of Conservatee be entered in the form provided herein, wherein the Fresno County Public Guardian, as Conservator of the Person and Estate of Raymond Petrie, be directed to Petrie Dorfmeier, LLP in the sum of \$33,765.00 (being the original amount requested on \$31,295.00 plus \$2,470.00) and the sum of \$1,768.70 for costs advanced or a total of \$35,533.70 for the period of August 13, 2015 through May 17, 2016.</p>	
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>	<p><b>Declaration of Public Guardian filed on 10/12/16</b> states they have no objection to the additional fee request.</p>	
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	<p><b>Reviewed by:</b> KT</p>	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> W/		
<input type="checkbox"/>	<b>Aff.Pub.</b>	<p><b>Reviewed on:</b> 11/10/16</p>	
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>	<p><b>Updates:</b></p>	
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>	<p><b>Recommendation:</b></p>	
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>	<p><b>File 8- Pirie</b></p>	
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		

**Status RE: Filing of the First or Final Account**

<b>DOD: 1/23/15</b>	<p><b>BRUCE BICKEL</b> was appointed Administrator with Full IAEA with bond of \$215,000.00 on 9/23/15. Bond was filed 10/6/15 and Letters issued 10/9/15.</p> <p>At the hearing on 9/23/15, the Court set this status hearing for the filing of the first or final account.</p> <p>Partial I&amp;A was filed 9/1/16. Final I&amp;A was filed 11/8/16.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. <b>Need first account or petition for final distribution pursuant to Probate Code §12200 or written status report pursuant to Local Rule 7.5.</b></p>
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<p><b>Reviewed by:</b> skc</p>	
	<p><b>Reviewed on:</b> 11/9/16</p>	
	<p><b>Updates:</b></p>	
	<p><b>Recommendation:</b></p>	
	<p><b>File 9- Inman</b></p>	

**Report on Waiver of Accounting and Petition for Its Settlement; and for Final Distribution**

<b>DOD: 03/15/2015</b>		<b>MICHELLE NEAL</b> , Executor, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Accounting is Waived	
		I&A - <b>\$166,804.88</b>	
		POH - <b>\$170,930.38</b>	
<b>Cont. from</b>		Executor – <b>Waives</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>	n/a	
<input type="checkbox"/>	<b>Aff.Mail</b>	n/a	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>	05/04/2015	
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		
			<b>Distribution, pursuant to decedent's Will, is to:</b>
			<b>Michelle Neal</b> – Cash in the amount of \$20,930.38, Residence located in Fresno County
			<b>Reviewed by:</b> LV
			<b>Reviewed on:</b> 11/10/2016
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 10- Prezioso</b>

<b>DOD: 05/30/2015</b>		<p><b>CHRISTOPHER KREMMER</b>, Administrator, is petitioner.</p> <p>Accounting is Waived</p> <p>I&amp;A - <b>\$154,700.00</b> POH - <b>\$23,867.79</b></p> <p>Administrator - <b>\$5,792.20</b> (Statutory)</p> <p>Administrator X/O - <b>\$540.84</b> (less than allowed by Local Rule 7.18 B)</p> <p>Attorney - <b>\$5,792.20</b> (Statutory)</p> <p>Attorney – X/O - <b>\$9,951.84</b> (50.6 hours at \$225/hr. totaling \$11,385.00 per Attorney’s itemized declaration for sale of real property)</p> <p>Costs - <b>\$1,490.70</b> (filing fees, certified letters, probate referee, publication)</p> <p><b>Petitioner prays for the following orders:</b></p> <ol style="list-style-type: none"> <li>1. That the administration be brought to a close;</li> <li>2. That the report of Petitioner, as Administrator of the Estate, is settled, allowed, and approved as filed;</li> <li>3. That all acts and transactions of Petitioner, as Administrator of the Estate, as reflected in the Petitioner’s Report are ratified, confirmed and approved;</li> <li>4. That any assets/not now known or discovered shall first be paid to the creditors in the percentages listed;</li> <li>5. That any additional assets/not now known or discovered shall then be paid in equal undivided shares to Christopher Kemmer, Ron Castia, Nicholas Kemmer.</li> </ol>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Petitioner requests extraordinary fees in the amount of \$540.84 however the prayer of the petition requests \$690.84. Need clarification.</li> <li>2. Petition requests extraordinary Attorney fees in the amount of \$9,951.84 however the prayer of the petition requests \$10,101.10. Need clarification.</li> <li>3. Proposed distribution totals \$23,776.74 however the property on hand is \$23,897.79 leaving a difference of \$91.05. Need clarification.</li> </ol>	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input checked="" 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 checked="" type="checkbox"/>	Letters			08/12/2015
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input checked="" type="checkbox"/>	FTB Notice			

**Reviewed by:** LV

**Reviewed on:** 11/10/2016

**Updates:**

**Recommendation:**

**File 11- Kemmer**

**12 Zoe Vaillancourt (GUARD/P)**

**Case No. 15CEPR00699**

**Petitioner: Taylor Vaillancourt (Pro per – Mother)**

**Attorney: Susan A. Hemb (for Stacy A. Vaillancourt – Guardian)**

**Petition for Visitation**

	<b>TAYLOR VAILLANCOURT</b> , mother, is petitioner.		<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>STACY VAILLANCOURT</b> , maternal grandmother, was appointed guardian on 9/23/15.		
			<p>1. Proof of service of <i>Notice of Hearing</i> shows service on Attorney Hemb on behalf of Stacy Vaillancourt (guardian). CA Rules of Court 7.51 requires direct notice on Stacy Vaillancourt.</p>
	<b>Cont. from</b>		
	<b>Aff.Sub.Wit.</b>		
	<b>Verified</b>	<i>Please see petition for details.</i>	
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b>	w/	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
			<b>Reviewed by:</b> SEF
			<b>Reviewed on:</b> 11/10/2016
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 12- Vaillancourt</b>

Status RE: Filing of the First or Final Account

<b>DOD: 4/25/15</b>		<p><b>JAMES HIGHSMITH</b> was appointed Executor with Full IAEA without bond and Letters issued on 9/10/15.</p> <p>At the hearing on 11/17/16, the Court set this status hearing for the filing of the first or final account.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. <b>Need first account or petition for final distribution pursuant to Probate Code §12200 or written status report pursuant to Local Rule 7.5.</b></p>
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
<b>Reviewed by: skc</b>			
<b>Reviewed on: 11/9/16</b>			
<b>Updates:</b>			
<b>Recommendation:</b>			
<b>File 13- Brooks</b>			

**Status RE: Receipt for Blocked Account**

<b>DOD: 4/25/13</b>	<p><b>JUANITA G. SALINAS</b>, daughter, was appointed Administrator with Will Annexed with Limited IAEA without bond, on 4/19/16. Letters issued 4/19/16.</p> <p>On 8/11/16, the Court confirmed the sale of real property and ordered the proceeds be placed into a blocked account. The Court set this status hearing re receipt for blocked account.</p> <p><b>Declaration of Randolph Krbechek Regarding the Status of Action filed 9/28/16 states</b> at the last hearing on 8/11/16, the court confirmed the sale of the real property. Escrow has not yet closed; therefore, there are no funds to be deposited into the blocked account. It is requested that the court grant a 30-day continuance.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note: Administrator's First and Final Account was filed 11/9/16 and set for hearing on 1/12/17; however, no receipt for blocked account has yet been filed.</b></p> <p><b>1. Need receipt for blocked account or written status report per Local Rule 7.5.</b></p>
<b>Cont. from 092916</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: skc</b>
		<b>Reviewed on: 11/9/16</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 14- Garcia</b>

<b>DOD: 12/08/2016</b>		<p><b>JUDITH L. THIESSEN</b>, Executor, is petitioner.</p> <p>Accounting is Waived</p> <p>I&amp;A - <b>\$303,451.57</b>                  POH - <b>\$304,122.44</b></p> <p>Executor - <b>Waived</b></p> <p>Attorney (statutory) - <b>\$9,069.03</b></p> <p>Costs - <b>\$1,675.45</b> (filing fees, probate referee, certified letters)</p> <p>Closing - <b>\$750.00</b></p> <p><b>Distribution, pursuant to decedent's Will, is to:</b></p> <p><b>Judith L. Thiessen</b> – Real property located in Fresno County; household furniture and furnishings; 2005 Chevrolet Silverado Pickup; Primerica IRA; Education Employees Credit Union Accounts.</p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> w/		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b> 04/05/2016		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		
		<p><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 11/10/2016</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b> Submitted</p> <p><b>File 15- Thiessen</b></p>	

Petition for Appointment of Guardian of the Person  
 (as to Samantha & Charlotte only)

		<b><u>TEMPORARY EXPIRES 11/17/2016</u></b>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Petition is as to <u>SAMANTHA</u> and <u>CHARLOTTE</u> only.</b> (Non-competing petitioner Amie Ward was appointed guardian of Justin on 8/9/2016.)</p> <p><b>Minute order dated 5/26/2016 states</b> both parents consent in open court. The Court orders <u>supervised visitation</u> for the parents every Saturday from 11 am – 1 pm at McDonald's. No other parties shall attend the visits and Mary Parfenova is to stay within eyesight and hearing distance at all times. The Court orders there is to be no discussion of this matter nor any disparaging comments about the other parties made to, or in front of, the minor(s).</p> <p><b>Continued from 8/18/2016.</b></p> <p>The following issues remain:</p> <ol style="list-style-type: none"> <li>1. Need proof of service of <i>Notice of Hearing</i> with copy of petition at least 15 days before the hearing <u>or</u> consents and waivers of notice <u>or</u> declarations of due diligence for:                     <ol style="list-style-type: none"> <li>a. Petar Milisavac (maternal grandfather)</li> <li>b. Justin Marbry (sibling – 14 years)</li> </ol> </li> </ol>
		MARY PARFENOVA, maternal aunt, is petitioner.	
Cont. from 071416, 081816			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
	Aff.Mail	x	
	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		
		<b>Reviewed by:</b> SEF	
		<b>Reviewed on:</b> 11/10/2016	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 16- Marbry</b>	

Please see petition for details.

Probate Status Hearing Re Filing Inventory & Appraisal

	<b>ANA M. MAGANA</b> , mother, was appointed Conservator of the Person and Estate, with the issue of bond to be reserved, on 07/20/2016.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>	Letters issued 09/08/2016	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>	Minute Order of 07/20/2016 set this status hearing for the filing of the Inventory and Appraisal.	
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	<b>Status Report filed 10/25/2016</b> states the only asset of the estate is a settlement under the action entitled Martinez v. Williams, Fresno County Superior Court Case No. 15CECG00641. On August 4, 2016, the court in Martinez v. Williams entered its Order Approving Compromise of Pending Action. Under the terms of the order, the amount \$180,000.00 will be made payable to Pacific Life & Annuity Service, Inc. to fund future periodic payments to Ana Magana as the Conservator of the Estate of Aaron Martinez, in the amount of \$1,804.27 per month, guaranteed 12 years, beginning on 06/14/2023. With the last payment to be made on May 14, 2035. The conservatorship is not the owner of the annuity.	
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>	At this time the conservatorship was established, there were no assets in the conservatorship estate. The conservatorship estate will have not assets until monthly payments being under the above annuity on 06/14/2023.	
		<b>Reviewed by:</b> LV
		<b>Reviewed on:</b> 11/10/2016
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 17- Martinez</b>

**Petition for Instructions to Trustee, to Compel an Accounting, Removal of Trustee for Breach of Trust and Appointment of Successor Trustee**

		<p><b>CHRISTOPHER KENNEDY and CURTIS KENNEDY</b>, vested remainder beneficiaries, are Petitioners.</p> <p><b>Petitioners state</b> the Alfred Schengel Testamentary Trust was created by Judgment entered 11/20/80 in the Estate of Alfred Schengel 0250035-3 under the terms of Alfred Schengel's Will (Judgment and Will attached).</p> <p>Lenore F. Schengel (L. Schengel), 92, is the surviving spouse of Alfred Schengel, and the mother of John Schengel (Respondent) and Constance Kennedy (C. Kennedy), deceased. Petitioners are the children of Constance Kennedy.</p> <p>Respondent and C. Kennedy are the remainder beneficiaries of the trust. Petitioners, as the surviving issue of C. Kennedy, are vested remainder beneficiaries.</p> <p>Petitioners state L. Schengel was diagnosed with dementia in 2013 or 2014, and currently resides in the memory care section of Cottonwood Court. Her living expenses there are \$4,590/month.</p> <p>The trust provides that the trustee shall pay to or use for the benefit of L. Schengel so much principal as suitable or necessary for her maintenance and support. See Articles Sixth and Seventh.</p> <p>As of 1/31/16, the trust estate contained a Morgan Stanley Active Assets Account with a value of \$444,802.77, which account was held in the names of C. Kennedy and Respondent as co-trustees.</p> <p>Prior to her death on 1/14/16, C. Kennedy handled all of L. Schengel's finances and financial matters and paid the monthly cost for the board and care of L. Schengel in a timely manner. Invoice No. 7206 in the amount of \$4,590.00 was paid by C. Kennedy to Cottonwood Court on 1/7/16.</p> <p>Petitioners state Respondent has intentionally declined to act in compliance with the terms of the trust in that he intentionally and willfully refused to pay the living expenses of L. Schengel for the months of February through April 2016 amounting to \$13,770.00.</p> <p style="text-align: center;"><b><u>SEE ADDITIONAL PAGES</u></b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order 8/4/16: Counsel requests 90 days. Counsel represent that parties are working towards resolution and progress is being made.</b></p> <p><b>1. Need order.</b></p> <p><b>Note: If granted, the Court will set status hearings for the filing of the bond by the successor trustee and the filing of an accounting by the former trustee as appropriate.</b></p>
<b>Cont. from 080416</b>			
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b>	W	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
	<b>Letters</b>		
	<b>Duties/Supp</b>		
✓	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
	<b>Order</b>	X	
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
			<p><b>Reviewed by: skc</b></p> <p><b>Reviewed on: 11/9/16</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 18- Schengel</b></p>

**Page 2 – Petitioners state** on 4/22/16, Cottonwood Court sent a written itemized statement to Respondent at his address, which shows an outstanding balance of \$18,360.00 through May 2016. The balance of \$13,770.00 through April 2016 was past due, and \$4,590.00 for May was due and payable on 5/1/16.

On 4/24/16, in order to prevent Cottonwood Court from evicting L. Schengel, Petitioner Christopher Kennedy paid the past due amount of \$13,770.00 out of his own personal assets, and subsequently made an oral demand upon Respondent to reimburse him the \$13,770.00, which Respondent failed and refused and continues to fail and refuse to do.

Petitioner's counsel sent a letter dated 5/24/16 to Respondent's address demanding reimbursement and that Respondent immediately pay Cottonwood Court's May invoice of \$4,590.00, which became due and owing on 5/10/16.

As of 6/16/16, Respondent has not paid L. Schengel's living expenses at Cottonwood Court for May and June 2015, which total \$9,180.00, once again subjecting L. Schengel to eviction.

Petitioners state Respondent's refusal to pay L. Schengel's living expenses and reimburse Petitioner for his payment thereof amounts to a violation of the trust and therefore a material breach of the trust. By reason of Respondent's conduct as described above, Respondent has demonstrated unfitness to serve as trustee and his removal and appointment of a successor trustee is necessary for the future protection and proper administration of the trust.

Upon his removal, there will be a vacancy, as C. Kennedy is deceased. The trust does not provide a practical method for appointing a trustee and does not name a person to fill the vacancy. Petitioners therefore nominate **BRUCE D. BICKEL** as successor trustee. See consent at Exhibit 6.

**Petitioners pray for an order:**

1. Instructing John A. Schengel, as trustee of the Alfred Schengel Testamentary Trust, to:
  - a. Immediately pay from the assets of the Alfred Schengel Testamenatry Trust the total amount of \$9,180.00 to Cottonwood Court for the months of May and June 2016;
  - b. Immediately pay Petitioner Christopher Kennedy from the assets of the Alfred Schengel Testamentary Trust the total amount of \$13,770.00 as reimbursement for his payment to Cottonwood Court in the amount of \$13,770.00;
  - c. Pay from the assets of the Alfred Schengel Testamentary Trust the monthly costs for L. Schengel's living expenses at Cottonwood Court by the 10<sup>th</sup> of every month for so long as L. Schengel resides at Cottonwood Court and for as long as John A. Schengel is the trustee of the Alfred Schengel Testamentary Trust;
  - d. Pay in a timely manner from the assets of the Alfred Schengel Testamentary Trust the monthly living expenses for L. Schengel at any subsequent facility should L. Schengel ever move from Cottonwood Court for so long as John A. Schengel is the trustee of the Alfred Schengel Testamentary Trust.
2. Removing John A. Schengel as Trustee of the Alfred Schengel Testamentary Trust;
3. Appointing Bruce D. Bickel as Successor Trustee of the Alfred Schengel Testamentary Trust and vesting him with all the powers vested in the office of the trustee under the trust instrument;
4. Requiring Bruce D. Bickel to give a surety bond in the amount of \$450,000.00 and that the cost of the bond be charged against the Alfred Schengel Testamentary Trust;
5. Compelling John A. Schengel to account fully for all trust property;
6. Compelling John A. Schengel to turn over to Bruce D. Bickel all original documents, deeds, bank and investment statements whether said statements are monthly, quarterly, or annual statements, all tangible and intangible personal property of the Alfred Schengel Testamentary Trust, and all bank accounts, investment accounts, mutual funds accounts, stocks, bonds, and keys to all real property that is an asset of the testamentary trust.;
7. Awarding Petitioners their attorney's fees and costs of the suit incurred herein; and
8. For such other orders as the Court may deem proper.

**Page 3 – Successor Trustee John A. Schengel’s Objection filed 8/1/16 admits or denies various statements in the petition and states Lenore F. Schengel passed away on 7/11/16.** Objector states that upon the death of his sister

(C. Kennedy), he became sole successor trustee. He was not represented by counsel and was unsure how to proceed. He consulted with an attorney re steps needed to administer the trust and began to carry out the instructions given to him. Mr. Schengel had no prior experience with such matters. Following the filing of the instant petition, Mr. Schengel retained Dowling Aaron Incorporated and is now being advised re his role and responsibilities as successor trustee.

Mr. Schengel states that because Mrs. Schengel's expenses at Cottonwood were paid by his sister, Mr. Schengel had no information regarding the cost of the facility or the amount of the monthly invoices. He took active steps to administer the trust in accordance with its terms: He attempted to gain access to the funds in a Union Bank account to pay Mrs. Schengel's expenses, but was unable to do so as the account was held in the name of Mrs. Schengel and C. Kennedy, individually. Upon advice, he completed the paperwork at Morgan Stanley, and understood there would be additional documents to sign before he could access the funds.

After being served with the petition, he was referred to the law office of Dowling Aaron Incorporated and retain said firm to assist with administration of his father's testamentary trust and his mother's trust. With the firm's guidance, he has begun administering the trusts, including paying his mother's expenses and the ongoing expenses of the trusts. Accordingly, he is acting appropriately in his role as trustee and following the terms of the trust.

Mr. Schengel received a statement from Cottonwood in late April 2016; however, at the time, he believed a long-term care policy paid her expenses. After some research, Mr. Schengel confirmed that there was such a policy, but that it paid monthly proceeds to the account at Union Bank that he could not access. He did not know that the Morgan Stanley funds could be used to pay the invoice.

Mr. Schengel states he was presented with documents supporting the allegation that Christopher Kennedy paid the outstanding amounts due to Cottonwood and has reimbursed him \$13,770 by delivering payment to his attorney, Melvin Rube, on 8/1/16, and he has now made full payment to Cottonwood for the entire outstanding amount.

Mr. Schengel states he took active steps to administer the trust as described above. Upon service of the petition, he retained Dowling Aaron Incorporated and has begun administering the trust and paying ongoing expenses. Accordingly, he is acting appropriately in his role as trustee.

The petition fails to state facts sufficient to support the request for his removal and for an accounting. He has rectified the situation by making full reimbursement to Petitioner, paying arrearage to Cottonwood Court, and by retaining counsel to assist with administration. Prior to the death of Mrs. Schengel on 7/11/16, Petitioners were not entitled to an accounting because she was the only beneficiary with right to distribution. Petitioners' allegations that he failed to reimburse Petitioner or pay Cottonwood Court – both debts that have now been paid in full – are not sufficient basis to compel accounting at this time. Mr. Schengel has an obligation to account annually to Petitioners for the period commencing 7/11/16, the day Mrs. Schengel passed away, and his first account is not due until next year unless he proposes to complete trust administration before that time.

**Objector prays the Court issues an order as follows:**

1. Denying the petition and all relief requested therein;
2. Granting Mr. Schengel reasonable costs of suit; and
3. Awarding any and all other relief the Court deems just and proper.

Petition for Instructions to Trustee, to Compel an Accounting, Removal of Trustee for Breach of Trust and Appointment of Successor Trustee

<b>Age: 92</b>	<b>CHRISTOPHER KENNEDY and CURTIS KENNEDY</b> , beneficiaries, are Petitioners.	<b>NEEDS/PROBLEMS/ COMMENTS:</b>  <b>Minute Order 8/4/16: Counsel requests 90 days. Counsel represent that parties are working towards resolution and progress is being made.</b>  <b>1. Need order.</b>  <b>Note: If granted, the Court will set status hearings for the filing of the bond by the successor trustee and the filing of an accounting by the former trustee as appropriate.</b>
	<b>Petitioners state</b> Lenore F. Schengel, Trustor, is 92, and is the mother of John A. Schengel (Respondent) and Constance Kennedy (C. Kennedy). Trustor established the revocable trust by executing a written trust instrument, the Lenore F. Schengel Living Trust, dated 11/2/99. Trustor was designated as the initial trustee of the trust. Trustor amended the trust on 12/17/07.	
<b>Cont. from 080416</b>	On 1/24/14, Trustor resigned as trustee and pursuant to Article IV, C. Kennedy accepted appointment as trustee.	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	C. Kennedy died 1/14/16. Petitioners are informed and believe and thereupon allege that as a result of her death, Respondent assumed the office of successor trustee and is currently acting as sole trustee.	
<input checked="" type="checkbox"/> <b>Verified</b>	Petitioners state although the trustor is living and as trustor would hold power to revoke, Petitioners believe the trust is irrevocable because the trustor is legally incompetent to exercise her power to revoke or amend the trust as she has no understanding of the trust instrument or the nature or extent of the trust assets and is not capable of resisting undue influence. The trustor is completely dependent on the trustee to manage the trust assets and to handle her finances.	
<input type="checkbox"/> <b>Inventory</b>	Petitioners are beneficiaries of the trust as the surviving issue of C. Kennedy and as such have standing to bring this petition.	
<input type="checkbox"/> <b>PTC</b>	Petitioners state as of 1/31/16, the trust estate contained a Morgan Stanley Active Assets Account with a value of \$101,766.43, which account was held in the name of C. Kennedy Trustee of the Lenore F. Schengel Living Trust.	
<input type="checkbox"/> <b>Not.Cred.</b>	<b>SEE ADDITIONAL PAGES</b>	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input type="checkbox"/> <b>Order</b>	x	
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by: skc</b>
		<b>Reviewed on: 11/9/16</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 19- Schengel</b>

**Page 2**

**Petitioners state** the trustor's living expenses at Cottonwood Court are \$4,590/month. On 4/22/16, Cottonwood Court sent a written itemized statement to Respondent at his address, which shows an outstanding balance of \$18,360.00 through May 2016. The balance of \$13,770.00 through April 2016 was past due, and \$4,590.00 for May was due and payable on 5/1/16.

On 4/24/16, in order to prevent Cottonwood Court from evicting L. Schengel, Petitioner Christopher Kennedy paid the past due amount of \$13,770.00 out of his own personal assets, and subsequently made an oral demand upon Respondent to reimburse him the \$13,770.00, which Respondent failed and refused and continues to fail and refuse to do.

Petitioner's counsel sent a letter dated 5/24/16 to Respondent's address demanding reimbursement and that Respondent immediately pay Cottonwood Court's May invoice of \$4,590.00, which became due and owing on 5/10/16.

As of 6/16/16, Respondent has not paid L. Schengel's living expenses at Cottonwood Court for May and June 2015, which total \$9,180.00, once again subjecting L. Schengel to eviction.

The trust provides that during the trustor's lifetime, the entire net income, and principal as needed, shall be paid to or for the benefit of the trustor to maintain the standard of living that she enjoyed on the date of execution.

Petitioners state Respondent's refusal to pay L. Schengel's living expenses and reimburse Petitioner for his payment thereof amounts to a violation of the trust and therefore a material breach of the trust. By reason of Respondent's conduct as described above, Respondent has demonstrated unfitness to serve as trustee and his removal and appointment of a successor trustee is necessary for the future protection and proper administration of the trust.

The trust provides that if C. Kennedy should be unwilling or unable to act, John Alfred Schengel is nominated as successor trustee. Should all of named trustees be deceased, unable or unwilling to act, any beneficiary named herein may petition the superior court in the County of Fresno for the appointment of a successor trustee. Petitioners therefore nominate **BRUCE D. BICKEL** as successor trustee. See consent at Exhibit 7.

**SEE ADDITIONAL PAGES**

**Page 3****Petitioners pray for an order:**

9. Instructing John A. Schengel, as trustee of the Lenore F. Schengel Living Trust, to:
  - a. Immediately pay from the assets of the Lenore F. Schengel Living Trust the total amount of \$9,180.00 to Cottonwood Court for the months of May and June 2016;
  - b. Immediately pay Petitioner Christopher Kennedy from the assets of the Lenore F. Schengel Living Trust the total amount of \$13,770.00 as reimbursement for his payment to Cottonwood Court in the amount of \$13,770.00;
  - c. Pay the monthly costs for L. Schengel's living expenses at Cottonwood Court by the 10<sup>th</sup> of every month for so long as L. Schengel resides at Cottonwood Court and for as long as John A. Schengel is the trustee of the Lenore F. Schengel Living Trust;
  - d. Pay in a timely manner from the assets of the Lenore F. Schengel Living Trust the monthly living expenses for L. Schengel at any subsequent facility should L. Schengel ever move from Cottonwood Court for so long as John A. Schengel is the trustee of the Lenore F. Schengel Living Trust.
10. Removing John A. Schengel as Trustee of the Lenore F. Schengel Living Trust;
11. Appointing Bruce D. Bickel as Successor Trustee of the Lenore F. Schengel Living Trust and vesting him with all the powers vested in the office of the trustee under the trust instrument;
12. Requiring Bruce D. Bickel to give a surety bond in the amount of \$105,000.00 and that the cost of the bond be charged against the trust;
13. Compelling John A. Schengel to account fully for all trust property;
14. Compelling John A. Schengel to turn over to Bruce D. Bickel all original documents, deeds, bank and investment statements whether said statements are monthly, quarterly, or annual statements, all tangible and intangible personal property of the trust, and all bank accounts, investment accounts, mutual funds accounts, stocks, bonds, and keys to all real property that is an asset of the trust.;
15. Awarding Petitioners their attorney's fees and costs of the suit incurred herein; and
16. For such other orders as the Court may deem proper.

**Page 4 – Successor Trustee John A. Schengel's Objection filed 8/1/16 admits or denies various statements in the petition and states Lenore F. Schengel passed away on 7/11/16.** Objector states that upon the death of his sister (C. Kennedy), he became sole successor trustee. He was not represented by counsel and was unsure how to proceed. He consulted with an attorney re steps needed to administer the trust and began to carry out the instructions given to him. Mr. Schengel had no prior experience with such matters. Following the filing of the instant petition, Mr. Schengel retained Dowling Aaron Incorporated and is now being advised re his role and responsibilities as successor trustee.

Mr. Schengel states that because Mrs. Schengel's expenses at Cottonwood were paid by his sister, Mr. Schengel had no information regarding the cost of the facility or the amount of the monthly invoices. He took active steps to administer the trust in accordance with its terms: He attempted to gain access to the funds in a Union Bank account to pay Mrs. Schengel's expenses, but was unable to do so as the account was held in the name of Mrs. Schengel and C. Kennedy, individually. Upon advice, he completed the paperwork at Morgan Stanley, and understood there would be additional documents to sign before he could access the funds.

After being served with the petition, he was referred to the law office of Dowling Aaron Incorporated and retain said firm to assist with administration of his father's testamentary trust and his mother's trust. With the firm's guidance, he has begun administering the trusts, including paying his mother's expenses and the ongoing expenses of the trusts. Accordingly, he is acting appropriately in his role as trustee and following the terms of the trust.

Mr. Schengel received a statement from Cottonwood in late April 2016; however, at the time, he believed a long-term care policy paid her expenses. After some research, Mr. Schengel confirmed that there was such a policy, but that it paid monthly proceeds to the account at Union Bank that he could not access. He did not know that the Morgan Stanley funds could be used to pay the invoice.

Mr. Schengel states he was presented with documents supporting the allegation that Christopher Kennedy paid the outstanding amounts due to Cottonwood and has reimbursed him \$13,770 by delivering payment to his attorney, Melvin Rube, on 8/1/16, and he has now made full payment to Cottonwood for the entire outstanding amount.

Mr. Schengel states he took active steps to administer the trust as described above. Upon service of the petition, he retained Dowling Aaron Incorporated and has begun administering the trust and paying ongoing expenses. Accordingly, he is acting appropriately in his role as trustee.

The petition fails to state facts sufficient to support the request for his removal and for an accounting. He has rectified the situation by making full reimbursement to Petitioner, paying arrearage to Cottonwood Court, and by retaining counsel to assist with administration. Prior to the death of Mrs. Schengel on 7/11/16, Petitioners were not entitled to an accounting because she was the only beneficiary with right to distribution. Petitioners' allegations that he failed to reimburse Petitioner or pay Cottonwood Court – both debts that have now been paid in full – are not sufficient basis to compel accounting at this time. Mr. Schengel has an obligation to account annually to Petitioners for the period commencing 7/11/16, the day Mrs. Schengel passed away, and his first account is not due until next year unless he proposes to complete trust administration before that time.

**Objector prays the Court issues an order as follows:**

4. Denying the petition and all relief requested therein;
5. Granting Mr. Schengel reasonable costs of suit; and
6. Awarding any and all other relief the Court deems just and proper.

Petition for Appointment of Guardian of the Person

		<b><u>TEMPORARY DENIED/DISMISSED 8/24/2016</u></b>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute order dated 9/22/2016 states</b> Kapria Armstrong (mother) provided drug test results to the Court. Ms. Jones requested a hair follicle test; Ms. Armstrong declined. Ms. Armstrong represented that her father, James Carr, is deceased. Ms. Jones was to verify the death.</p> <p><b>Continued from 11/1/2016.</b> Minute order dated 11/1/2016 states Counsel requested a continuance for discussions.</p> <p>The following issues remain:</p> <ol style="list-style-type: none"> <li>1. Per minute order dated 9/22/2016, need verification of the death of James Carr (maternal grandfather).</li> </ol>
		<p><b>TAISHA PAGGETT</b>, paternal half-sister, is petitioner.</p> <p><i>Please see petition for details.</i></p>	
Cont. from 092216, 110116			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv.	w/	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	ICWA		
			<p><b>Reviewed by:</b> SEF</p> <p><b>Reviewed on:</b> 11/10/2016</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b> File 20- Paggett</p>

21 Jesse Estrada, Alicia Estrada Horn, Alexis Estrada Horn,  
Cerryia Estrada Puga and Esther Estrada (GUARD/P) Case No. 16CEPR00827

Petitioner: Susan Horn (Pro per)

Amended Petition for Appointment of Temporary Guardian of the Person  
(as to Alicia, Alexis, Cerryia and Esther only)

		<b><u>TEMPORARY EXPIRES 11/17/2016</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>SUSAN HORN</b> , paternal grandmother (of Alicia and Alexis), is petitioner.	<p><b>Petition is as to Alicia, Alexis, Cerryia and Esther only.</b> There is a non-competing guardianship petition filed by Veronica Denney (maternal cousin) for these minors' sibling, Jesse. The general hearing was continued to 11/14/2016.</p> <p><b>Continued from 10/13/2016.</b> Petitioner represents the only information she was able to obtain re: Esther's (minor) father is his first name is Eli. Matter is continued for notice as to Jesse Garcia, father of Cerryia only. The Court will allow notice via text or Facebook message with all of the pertinent information, with a printout of the messages and/or the device being brought to the Court for proof.</p> <p>As of 11/10/2016, the following issue remains:</p> <ol style="list-style-type: none"> <li>1. Need proof of service of notice per minute order dated 10/13/2016, for:             <ol style="list-style-type: none"> <li>a. Jesse "Heilberto" Garcia (presumed father of Cerryia) – <i>unless the Court excuses notice per declaration of due diligence filed 11/9/2016</i></li> </ol> </li> </ol>
		<i>Please see petition for details.</i>	
<b>Cont. from 101316</b>			
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b>	w/	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
✓	<b>Pers.Serv.</b>	w/	
✓	<b>Conf. Screen</b>		
✓	<b>Letters</b>		
✓	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
✓	<b>CI Report</b>		
	<b>9202</b>		
✓	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
✓	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
			<b>Reviewed by:</b> SEF
			<b>Reviewed on:</b> 11/10/2016
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 21- Estrada, Horn, Puga</b>

Petitioner: Blanca Granados (Pro per – Mother)

Petitioner: Carlos Montantes, SR (Pro per – Father)

Petition for Appointment of Probate Conservator

		<b><u>NO TEMPORARY REQUESTED</u></b>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Court Investigator advised rights on 9/28/2016.</b></p> <p><b>Continued from 10/13/2016.</b> As of 11/10/2016, the following issues remain:</p> <ol style="list-style-type: none"> <li>1. Need proof of service at least 15 days before the hearing of the <i>Notice of Hearing</i> with copy of the petition on:             <ol style="list-style-type: none"> <li>a. Mireya Montantes (sister)</li> <li>b. Maria Luisa Granados (grandmother)</li> </ol> </li> </ol> <p><b>Note:</b> Two separate proofs of service of the <i>Notice of Hearing</i> were filed 10/19/2016, but show service on the proposed conservatee <i>effected and signed</i> by Ms. Montantes and Ms. Granados (instead of service of the notice on Ms. Montantes and Ms. Granados).</p>
		<p><b>BLANCA GRANADOS and CARLOS MONTANTES, SR.,</b> parents, are petitioners and request appointment as co-conservators of the person with medical consent powers.</p> <p style="text-align: center;"><i>Please see petition for details.</i></p>	
<b>Cont. from 101316</b>			
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b>	w/	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
✓	<b>Pers.Serv.</b>	w/	
✓	<b>Conf. Screen</b>		
✓	<b>Letters</b>		
✓	<b>Duties/Supp</b>		
	<b>Objections</b>		
✓	<b>Video Receipt</b>		
✓	<b>CI Report</b>		
	<b>9202</b>		
✓	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
✓	<b>Citation</b>		
	<b>FTB Notice</b>		
			<b>Reviewed by:</b> SEF
			<b>Reviewed on:</b> 11/10/2016
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 22- Montantes</b>

Petitioner: Catalina Victoria Shea (Pro per – Paternal aunt)

Petition for Appointment of Guardian of the Person

		<b><u>TEMPORARY EXPIRES 11/17/2016</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>CATALINA VICTORIA SHEA</b> , paternal aunt, is petitioner.	<b>Please see related page 3.</b> Petitioner is also filing for guardianship for half-sibling, Isaac Earl Shea, in Case no. 11CEPR01127.
<b>Cont. from</b>			<b>Minute order dated 10/3/2016</b> from temporary hearing states objections need to be filed and served on anyone legally entitled to notice 15 days before the 11/17/2016 hearing.
	<b>Aff.Sub.Wit.</b>		As of 11/10/2016, no objections have been filed with the Court.
✓	<b>Verified</b>		2. Need proof of service at least 15 days before the hearing of the <i>Notice of Hearing</i> with a copy of the petition on <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence for: <ul style="list-style-type: none"> <li>a. Matthew Shea (sibling) - <i>if 12 years or older</i></li> </ul>
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>		
	<b>Aff.Mail</b>		
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
✓	<b>Pers.Serv.</b>	w/	
✓	<b>Conf. Screen</b>		
✓	<b>Letters</b>		
✓	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>	x	
	<b>9202</b>		
✓	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
✓	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
			<b>Court Investigator to provide:</b> <ul style="list-style-type: none"> <li>• Investigation report</li> <li>• Clearances</li> </ul>
			<b>Reviewed by:</b> SEF
			<b>Reviewed on:</b> 11/10/2016
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 24- Shea</b>

Petitioner: Elva Carpio (Pro per – Mother)

Petitioner: Olympia Elizabeth Carpio, (Pro per – Sister)

Petition for Appointment of Probate Conservator

		<b><u>NO TEMPORARY REQUESTED</u></b>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Court investigator Advised Rights on 10/28/2016</b></p> <p><b>Voting Rights Affected – Need Minute Order</b></p> <p>1. Need video viewing certificate for both petitioners.</p> <p><b>Note:</b> Petitioners did not request medical consent powers, but the Court Investigator feels it would be beneficial for them to have. The Court Investigator report states petitioners intend to contact the paralegal that is assisting them to have their petition amended. However, as of 11/10/2016 no amended petition has been filed.</p>	
		<p><b>ELVA CARPIO and OLYMPIA C. MEJIA</b>                  (mother and sister) are petitioners and request appointment as co-conservators of the person</p>		
Cont. from		<p><i>Please see petition for details.</i></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 checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			w/
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			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 checked="" type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			<p><b>Reviewed by:</b> SEF</p> <p><b>Reviewed on:</b> 11/10/2016</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 25- Carpio</b></p>	

<b>DOD: 05/29/2016</b>		<b>CYNTHIA M. SOLO CURL,</b> daughter/named Executor without bond, is petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Copy of the decedent's Will is required to be attached to the petition pursuant to Probate Code §8002.</li> <li>2. Need Confidential Supplement to Duties &amp; Liabilities of Personal Representative, Mandatory Judicial Council Form DE-147S.</li> </ol> <p><b>Note: If the petition is granted status hearings will be set as follows:</b></p> <ul style="list-style-type: none"> <li>• <b>Thursday, 04/13/2017 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <u>and</u></li> <li>• <b>Thursday, 01/11/2018 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
		Full IAEA – o.k.	
<b>Cont. from</b>		Will: 08/18/1999	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Residence: Fresno	
<input checked="" type="checkbox"/>	<b>Verified</b>	Publication: The Business Journal	
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>	<b>Estimated value of the Estate:</b>	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Personal property - \$87,340.00	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	Real property - \$210,000.00	
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>	<b>Total - \$297,340.00</b>	
<input type="checkbox"/>	<b>Sp.Ntc.</b>	Probate Referee: Rick Smith	
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
<b>Reviewed by:</b> LV			
<b>Reviewed on:</b> 11/10/2016			
<b>Updates:</b>			
<b>Recommendation:</b>			
<b>File 26- Loop</b>			

Attorney: Michael Weinberg (for Petitioner Roger C. Beckman)

Attorney: Curtis Rindlisbacher (Court appointed for Conservatee)

Petition for Appointment of Probate Conservator

		<b>THERE IS NO TEMPORARY.</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		No temporary was requested.	
		<b>ROGER BECKMAN</b> , spouse, is petitioner and requests appointment as conservator of the person and of the estate.	<ol style="list-style-type: none"> <li>Item #1b of the petition is incomplete re: name and address of person who is to be appointed as conservator of the estate.</li> <li>Petition does not address bond. Item #1c of the petition. If granted, bond should be set at \$29,500.00.</li> <li>Item #2 of the petition is not complete re: name and present address of the proposed conservatee.</li> <li>Need Duties of Conservator.</li> <li>Need Conservatorship Video Viewing Receipt.</li> <li>Order is not completed.</li> </ol>
<b>Cont. from</b>		<b>Court Investigator Dina Calvillo's Report</b> filed on 11/8/16.	
<input type="checkbox"/>	Aff.Sub.Wit.	<b>Request for Dismissal submitted 11/14/2016 by Petitioner ROGER BECKMAN was not entered as requested, and was filed on 11/15/2016 stating</b> that the Court has appointed Curtis Rindlisbacher for the proposed Conservatee, and an Objection has been filed on 11/15/2016 for the upcoming hearing set on 11/17/2016.	
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory	<b>Objection to Petition for Appointment of Conservator of the Person and Estate</b> filed by <b>LAWRENCE C. DUNHAM</b> , proposed Conservatee, on 11/15/2016.	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp	X	
<input checked="" type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt	X	
<input checked="" 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 checked="" type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			<b>Reviewed by:</b> KT
			<b>Reviewed on:</b> 11/10/16
			<b>Updates:</b> 11/15/16 (LEG)
			<b>Recommendation:</b>
			<b>File 27- Dunham</b>

Attorney Lisa Horton (for Petitioner Philip L. Oliver, brother)

Petition for Appointment of Temporary Conservator of the Person and Estate

		<u>GENERAL HEARING SET FOR 12/15/2016</u>	<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need <i>Duties of Conservator</i> signed by Petitioner, and the <i>Confidential Supplemental Information Form</i>.</li> <li>2. Need proposed temporary order and temporary letters.</li> <li>3. Need proposed <i>Order to Deposit Money Into Blocked Account</i>, or bond of <b>\$124,318.59</b>.</li> </ol> <p><b>Note:</b> If temporary <i>Petition</i> is granted, Court will set status hearing as follows:</p> <ul style="list-style-type: none"> <li>• <b>Thursday, December, 15 2016 at 9:00 a.m. in Dept. 303</b> for filing of proof of bond/funds in blocked account.</li> </ul> <p>Pursuant Local Rule 7.5, if the document noted above is filed prior to the date listed, the hearing will be taken off calendar and no appearance will be required.</p>
		<p><b>PHILIP L. OLIVER</b>, brother, is Petitioner and requests appointment as Conservator of the Person and Estate with all funds in a blocked account.</p> <p><b>Court Investigator's Report was filed on 11/14/2016.</b></p>	
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.		
✓	Conf. Screen		
	Letters	X	
	Duties/Supp	X	
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
	Order	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		<p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 11/15/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 28- Wharff</b></p>	