

Petition for Compensation for Representation of Conservatee [Prob. C. 1470 & 1472(a)]

	Petitioner GARY G. BAGDASARIAN was court appointed to represent the Conservatee on 8-11-10.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. On 11-7-13, Petitioner filed a Notice of Representation of Bruce D. Bickel as Successor Conservator of the Estate, which states that Petitioner now represents both the Conservatee and the Conservator of the Estate based on Waivers of Conflict of Interest executed by both parties (copies filed 11-12-13). The Court may require clarification regarding Petitioner's representation of both Conservatee and conservator.</p>	
	Robert N. Lowder and Marcia D. Lowder are the current successor co-conservators of the Person.		
Aff.Sub.Wit.			
Verified			
Inventory	Bruce D. Bickel is the current successor conservator of the Estate.		
PTC			
Not.Cred.			
Notice of Hrg	Petitioner requests fees in connection with legal services rendered to the Conservatee from 5-11-12 through 10-2-13, including review of documentation in connection with the personal care of the Conservatee including responding to demand letters from creditors, discussing personal tax, maintenance, expense verification issues with Conservatee and conservator of the estate, Wells Fargo Bank, and related matters., the appointment of successor probate conservator of the estate Bruce Bickel, attendance at hearings, and discussing transfer of assets, budget, and related matters with the Conservatee and the newly appointed conservator of the estate.		
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order	Petitioner requests that he be paid from the conservatorship estate fees of \$7,125.00 and costs of \$972.50.		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation	Services are itemized by date. See declaration.		
FTB Notice	Bruce D. Bickel, Conservator of the estate, filed Notice of No Objection to Petition for Compensation on 11-4-13.		
			Reviewed by: skc
			Reviewed on: 11-8-13
			Updates: 11-13-13
		Recommendation:	
		File 1 – McDaniels	

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Case No. 10CEPR00544

Atty Baker-Grumprecht-Davies, Kathleen (for Melissa Russell – paternal grandmother)

Atty Bradbury, Peggy (pro per – maternal grandmother/Petitioner)

Petition for Visitation

Rebecca, 11	PEGGY BRADBURY, maternal grandmother, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 10/01/13 Minute Order from 10/01/13 states: Ms. Baker-Grumprecht-Davies is appearing as counsel for Melissa Russell. Ms. Bradbury admits making statements to the children that were inappropriate. The Court is informed that the children are participating in therapy. The court orders that an evaluation be conducted for the purpose of determining how visitation should start between the children and Ms. Bradbury. Waivers of confidentiality are obtained from the parties for the release of information from the therapists. Ms. Bradbury is ordered to provide Ms. Baker-Grumprecht-Davies and the Court the relevant documents regarding her participation in therapy. The Court investigator is ordered to conduct an investigation of the parties.</p> <p>1. Proof of service on the Notice of Hearing filed 09/04/13 indicates that the Notice of Hearing was mailed to the guardian's attorney and not to the guardian. Further, the proof of service does not indicate that a copy of the Petition for Visitation was served along with the Notice of Hearing. Service to an attorney is insufficient pursuant to California Rule of Court 7.51 and Probate Code § 1214. Need proof of service by mail at least 15 days before the hearing to Guardian, Melissa Russell.</p>
Eva, 8	MELISSA RUSSELL, paternal grandmother, was appointed Guardian of the Person and Estate on 08/09/10. Letters of Guardianship were issued on 08/26/10.	
Cont. from 100113	Parents are both deceased.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Petitioner states that her daughter, the children's mother, died in October 2009. After her death, the father allowed the guardian to have frequent visits. Petitioner states that she had a good relationship with the father until his death in May 2010. After the father's death, the paternal grandmother, Melissa Russell, was appointed guardianship. Initially, Petitioners relationship with the guardian was good and Petitioner visited with the children frequently and the children spent all holidays with Petitioner. In August 2011, the guardian abruptly stopped all visitation and cut off all communication with petitioner. The guardian continues to refuse Petitioner visitation.	
<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/o	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections	Petitioner requests visitation with the children as follows:	
<input type="checkbox"/> Video Receipt	<ol style="list-style-type: none"> 1. During the summer months. 2. One week of Easter vacation. 3. One week of Thanksgiving vacation. 4. Two weeks of Christmas vacation. 5. Anytime Petitioner is in Fresno as reasonably agreed between Petitioner and Guardian. 	
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order	X	
<input type="checkbox"/> Aff. Posting	For visitation in Sacramento, Petitioner requests that she meet the guardian in Turlock to exchange the children.	
<input type="checkbox"/> Status Rpt	For visitation in Fresno, Petitioner requests she be allowed to pick up and drop off the children from the guardian's home. While visiting in Fresno, the children will stay with Petitioner at her cousin's home in Fresno.	
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice	Continued on Page 2	
		Reviewed by: JF
		Reviewed on: 11/08/13
		Updates: 11/13/13
		Recommendation:
		File 2 – Pitkin

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Guardian's Responsive Declaration in Opposition of Petition for Visitation filed 09/25/13 states:

Petitioner's petition for visitation is misleading. Petitioner did have some visitation with the girls approximately every 6 weeks or so while their father was still alive. The visitation did continue for a short time after Justin's death. However, she did not have extensive visits with the girls as she alleges in her Petition. Further, the guardian's relationship with Petitioner was strained at best and the guardian ultimately determined that it would be detrimental to the girls to have any unsupervised visits with Petitioner, due to Petitioner's behavior. On 08/24/11, guardian's attorney sent a letter to Petitioner notifying her that any future visits would need to be supervised and at the discretion of a therapist. Guardian came to the decision to not allow Petitioner unsupervised visits after she insisted that she discuss paternity and other issues with them that were not age appropriate and undermining to the guardian. This started happening in 2010, just after the father passed away. Guardian has attached numerous text messages to her Response to show the court the type of messages she received from Petitioner. In the messages, Petitioner goes from being angry to nice and then sad. Many of the messages were threatening to the guardian with Petitioner calling guardian a "liar" and stating that she would "kick my ass". On a phone call, Petitioner blurted out to Rebecca that Justin was not her father. Upon that occurring, Guardian took the phone from Rebecca and has not allowed Petitioner to communicate with the girls since. Rebecca was 8 years old when this occurred and had lost both of her parents within the last year. At no time has Petitioner asked for visitation under the conditions Guardian set forth in her letter of 08/24/11. Instead she has continually harassed Guardian via cell phone.

Guardian states that the only reason Justin was not initially on Rebecca's birth certificate is because she was born before he and Michelle were married and Justin had not signed the Declaration of Paternity when the nurse came in with the birth certificate forms. Michelle listed Justin as Rebecca's father in her baby book and never told Justin or Rebecca that he was not her father. After Michelle's death, Justin petitioned the Court for a Judgment of Paternity so that everything was legal and there was no question of his paternity. The Judgment was granted on 05/21/10 (just 11 days after Justin's death), and Rebecca's birth certificate has since been amended listing Justin as her father.

Petitioner's behavior and the statements she makes when she is angry are the reason Guardian does not believe it is in the girls' best interest to have visitation with Petitioner in an unsupervised setting. Initially, Guardian wanted the girls to have a continuing relationship with their mother's family, however, as time went on, Guardian's interactions with Petitioner showed her instability and Guardian chose to limit visitation to a supervised setting. The important thing is what Petitioner did not tell the Court. She did not attach any writings between us because they were harmful to her request. She also did not mention Guardian's letter dated 08/24/11 stating that only supervised visits would be allowed moving forward.

Guardian requests the Court deny Petitioner's request for visitation with the children in its entirety. Although they miss their parents greatly, they have adjusted to their new lives and attend therapy every other Friday instead of once per week as they had in the beginning. The girls do not need the horrors of their parent's death brought up in an unhealthy manner such as Petitioner has historically displayed. The girls should not be subjected to the behavior that Petitioner displays or the hurtful things she openly says when she is angry. If the Court feels that the girls should have contact with Petitioner at this point, then that visitation should be in a therapeutic setting with the children's therapist with all costs of these therapeutic sessions being the responsibility of Petitioner.

Court Investigator Charlotte Bien filed a Supplemental Report on 11/12/13.

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Appendix of Further Evidence in Support of Petition for Visitation filed by Peggy Bradbury on 11/12/13 states/includes:

- 1. Supplemental Declaration of Peggy Bradbury in Support of Petition for Visitation states:** She feels she is at an extreme disadvantage in this matter. She has limited financial means and cannot afford an attorney, unlike the guardian. She feels that the guardian has unfairly used a position of monetary strength to her benefit. The guardian abruptly and unilaterally ceased all visitation on 08/24/11, shutting down all communication on that date. Ms. Bradbury states that she is not proud of the things she said during that time and realizes that her efforts at communication could have been more civil. However, at the time, she was extremely depressed and struggling with a weakened emotional state due to losing multiple family members in a relatively short period of time (she lost both of her parents, her daughter and then son-in-law). When the guardian stopped all visitation, it was like she lost her granddaughters as well. This caused her to fall into a deeper emotional tailspin. She felt hopeless and powerless to see her grandchildren. Her emotional state was not helped by chronic pain she was dealing with as well. She felt as though the guardian was using her attorney and financial advantage to push her away. All of these factors caused her to make heated statements from a powerless and weak emotional state. At the urging of her family, she sought psychiatric care towards the end of 2011. She continues with treatment to this day. The process has admittedly been long and a struggle at times, however, towards the end of 2012, she felt she turned a corner. While she is still dealing with depression, she is handling it much better with medication and coping strategies that she has learned during treatment. She has also learned to deal with her anger. She states that the treatment she received has been a tremendous help and she feels much better. She states that she continues to see a psychiatrist, but because she is doing so well, he only sees her once every two months. She states, "For the first time in a long time, I feel positive about my life and my outlook has changed dramatically." She wants to point out the last of the text messages that the guardian took issue with were well over a year old. After getting better, and hoping to once again broach the subject of visits with her grandchildren, she sent the guardian very civil and polite messages in July and October of 2013. The Guardian has continued to ignore all of her messages and has not responded. Ms. Bradbury states that it breaks her heart that she has been denied visitation and is willing to visit them in Fresno at her cousin Jennifer Farmer's home. The children have past experiences at Jennifer's house and are comfortable there. Further, the children have a long and enjoyable history of interacting with Jennifer's children.
- 2. Declaration of Matthew Farmer states:** He is an attorney. His wife Jennifer is the cousin of Peggy Bradbury. He has known Ms. Bradbury approximately 21 years. She has always been close to Jennifer. Peggy's daughter, Michelle (the children's mother) was like a sister to Jennifer. Over the years, they had a close relationship with Rebecca and Eva and the girls spent a lot of time at their home. Even after Michelle passed away, Justin (the girls' father) continued to bring the girls to their house for visits. Peggy had a very difficult time dealing with the loss of her daughter and then son-in-law. She expressed her heartbreak to him on numerous occasions. Peggy's spirits were lifted everytime she was around the girls. There were numerous times that the girls stayed with Peggy at their home over multiple days. Both Peggy and the girls seemed very happy and loving towards one another. For reasons baffling to him, the guardian unilaterally cut off all visitation in August 2011. From that day, he observed Peggy's mental state deteriorate, she was devastated. He noticed a stark and sad change in her personality and outlook on life, she even became withdrawn from Jennifer at times, which was highly unusual given their past close relationship. He encouraged Peggy to seek mental health care. It took some time, but he noticed Peggy changing for the better starting in early 2013. She renewed more frequent and regular visits to their home, regained her sense of humor, and seemed more at peace with herself. It appeared that the treatment had been extremely helpful, making Peggy a better person and returned her to being the Peggy he had known for over 20 years. Over the last year, he has entrusted Peggy to care for his own children. He completely trusts her and feels that his children are well cared for while in Peggy's care. She is like another grandmother to his children. He states that there is zero doubt in his mind that Peggy would positively influence, and interact with, her grandchildren.

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He states that Peggy is free to use his home as a place for visitation. The children will be able to visit with Peggy here in Fresno and not have to leave the area. His house is large enough for all of them. Further, his children would enjoy seeing the girls again. He further states that he and his wife Jennifer have gotten along well with the guardian in the past and believes that she trusts both of them. He also states that as an attorney with 16 years of experience, he knows the importance of following court orders and states that he has advised Peggy that it is critical that she follows any court order and Peggy has acknowledged that she will do so. He believes that allowing Peggy to have visitation with the girls at his home is an ideal situation that can be closely monitored.

3. **Declaration of Jennifer Farmer in Support of Petition for Visitation states:** She has enjoyed an extremely close relationship with Peggy Bradbury for many years. She also witnessed Peggy's decline after the deaths of members of her family and then being barred from visiting with her granddaughters. Since seeking help and counseling, Peggy's demeanor has changed for the better and she has blossomed back into the loving, warm and funny person she had always been. Peggy continues to visit her family here in Fresno regularly. Ms. Farmer states that Peggy often helps her care for her children and that Peggy is wonderful with her children. Ms. Farmer states that she has tried reaching out to the guardian via text message, but the guardian has not responded. The guardian's failure to respond illustrates the necessity for court intervention. Ms. Farmer implores the court to allow Peggy to have visitation with her grandchildren. Especially with the loss of their parents, the children shouldn't be denied someone who loves them unconditionally and the security they enjoyed having Peggy in their lives.
4. **Declaration of Carol Kess in Support of Petition for Visitation:** She is Peggy Bradbury's first cousin. She has known Peggy her entire life and she and Peggy has always been very close to her and her children. Peggy had been very involved with the girls their entire lives until the guardian cut off visitation. Ms. Kess states that she witnessed Peggy struggling to get her visitation back and she became overwhelmed trying to handle the situation on her own. She observed Peggy withdraw, become upset and depressed. She expressed that she felt powerless and hopeless because she could not afford an attorney like the guardian. The change in Peggy's outlook on life alarmed her and she encouraged Peggy to seek professional help in late 2011. She states that Peggy did seek treatment and continues with treatment to this day. Over the past year, Peggy has improved dramatically, she seems to have her depression under control and is better able to cope with the devastating losses of family she suffered over the past couple of years. Ms. Kess feels that Peggy should be awarded visitation with her grandchildren. Based on her observation of previous interactions between Peggy and her grandchildren, the relationship is beneficial to all of them. The relationship was filled with love, compassion and caring for the children by Peggy. Ms. Kess believes that the girls will be excited to see their grandmother and visit their extended family again.

Petition for Approval of Trustee's First Account Current

		CHRISTINE ADAMS , Trustee, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED TO 1-8-14 per attorney request</p> <ol style="list-style-type: none"> 1. Need itemization re attorney fee request per Cal. Rules of Court 7.751 (b), 7.702. 2. Petitioner states the beginning property on hand was \$629,584.98; however, according to the trust itself, the beginning POH should be only the mobile home (carry value \$21,000.00) received from the conservatorship estate. 3. Petitioner states the balance on hand for distribution to the beneficiary from the Scharton estate was \$599,164.16. However, pursuant to Order Approving Second and Final Report of Administrator filed 8-9-12 in 09CEPR00512, as well as the Order Authorizing Addition of Asset to Grantor Trust filed 8-13-12 in 12CEPR00361, the amount to be distributed was \$603,639.16. Need clarification regarding the \$4,458.84 discrepancy. 4. Petitioner states the trustee was authorized to add the additional amount of \$9,409.75 received in connection with a wrongful death settlement to the trust pursuant to the 8-13-12 order; however, that order only specifically addressed the amount to be received from the final estate order, which was the \$603,639.16. It does not appear that the trustee trustee was authorized to transfer that additional assets without approval. 5. Social Security and other income/receipts should not be included in the trust. Need clarification, authority. Also need clarification, authority regarding the checking/savings accounts that appear to be used for day-to-day expenses. 6. Petitioner did not use the mandatory judicial counsel form schedules required.
		Account period: 8-31-12 through 8-31-13	
		Accounting: \$642,438.63 Beginning POH: \$629,584.98 Ending POH: \$631,282.95	
	Aff.Sub.Wit.	Trustee: Not requested	
✓	Verified	Attorney: \$8,940.00 (for 29.8 hours @ \$300/hr for services in connection with the conservatorship and this trust, per declaration, <u>no itemization provided</u>)	
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order	<p>Petitioner prays for an order:</p> <ol style="list-style-type: none"> 1. Approving, allowing, and settling the First Account; 2. Authorizing payment of the attorney fees; 3. Granting such other relief as the Court considers proper. <p>Note: If granted, the Court will set status hearing for filing of the next account as follows:</p> <ul style="list-style-type: none"> • Friday 10-10-14 if a one-year account is required, Or • Friday 10-9-15 if a two-year account is required. 	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 11-7-13
			Updates: 11-14-13
			Recommendation:
			File 3 – Fulbright

(1) First and Final Accounting & Report of Personal Representative; (2) Petition for Final Distribution of Ancillary Probate Estate

DOD: 08/16/12		<p>J. LAVONNE BENNETT, Executor, is Petitioner.</p> <p>Account period: 08/16/12 – 09/30/13</p> <p>Accounting - No Accounting has been presented</p> <p>I & A - \$175,000.00 POH - \$175,000.00</p> <p>Executor - waived Attorney - waived</p> <p>Distribution, pursuant to Decedent's Will, is to:</p> <p>J. Lavonne Bennett, Trustee of the Donald H. Bennett and J. Lavonne Bennett Trust - Real property valued at \$175,000.00 (100% of the estate)</p> <p>Verified Supplement to First and Final Accounting & Report of Personal Representative filed 11/06/13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 10/21/13 As of 11/08/13, the following notes remain:</p> <ol style="list-style-type: none"> The Verified Supplement to First and Final Account & Report of Personal Representative filed 11/06/13 is not verified by the fiduciary. The "accounting" provided in the Supplement does not conform to the Probate Code (see Probate Code § 1061 and 1064). Need Accounting <u>or</u> waiver of accounting from J. Lavonne Bennett as Trustee of the Donald H. Bennett and J. Lavonne Bennett Trust. <u>Note:</u> If a waiver of account is filed by the Trustee, the Trustee must also file a written acceptance of the Trust. (See Probate Code § 10954(b)(4) and §15600). The assets of the estate are proposed to be distributed to a pre-existing trust, therefore the current trustee must file a declaration setting forth the name of the trust, its establishment date, taxpayer identification number, verifying that the trust is in full force and effect, and that the trustee has an executed copy of the trust in possession. (See Local Rule 7.12.4) Notice was provided to the FTB on 09/17/13. The Court may require additional time to allow the FTB to make a claim against the estate given the late notice.
Cont. from 102113			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters 03/21/13		
<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		
		<p>Reviewed by: JF</p> <p>Reviewed on: 11/08/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 4 – Bennett</p>	

DOD: 12/09/12		RICHARD RAMOS , son/named co-Executor without bond, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>CONTINUED TO 12/11/13</u> Per request of Counsel</p> <ol style="list-style-type: none"> The Petition is marked at item 5(a)(8) that the decedent was not survived by issue of a pre-deceased child; however, decedent's will indicates that she had a pre-deceased child (Judith Martinez) who had issue (April Martinez-Gann & Adam Martinez). Judith Martinez is not listed in item 8 of the Petition. Need date of death of Judith Martinez pursuant to Local Rule 7.1.1D. Predeceased spouse is not named in item 8 of the Petition. Need name and date of death of predeceased spouse pursuant to Local Rule 7.1.1D. Decedent's Will nominates Petitioner to serve as Co-Executor along with James J. Melgoza and Monet J. Melgoza Cornelison. The Petition indicates that Richard Ramos is seeking to be appointed as the sole Executor, therefore need declinations to serve from James J. Melgoza and Monet J. Melgoza Cornelison or revised Petition seeking appointment of all three persons as Co-Executors. Need the relationships to decedent of each person listed in item 8 of the Petition. Note: Petitioner's name and relationship should also be listed in item 8 of the Petition. Need affidavit of publication. <p>Note to Judge: The Examiner has retained the Order & Letters in this matter due to the above defects.</p> <p>Reviewed by: JF</p> <p>Reviewed on: 11/08/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 5 - Melgoza</p>
		Full IAEA – NEED PUBLICATION	
Cont. from 100713		Will dated 10/11/12	
<input type="checkbox"/>	Aff.Sub.Wit.	s/p	
<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		
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<input type="checkbox"/>	Aff.Pub.	x	
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<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Residence: Clovis Publication: NEED</p> <p>Estimated Value of the Estate: Personal property - \$ 11,500.00 Real property - 142,328.00 Total - \$153,828.00</p> <p>Probate referee: STEVEN DIEBERT</p> <p>Note: If the Petition is granted, status hearings will be set as follows:</p> <ol style="list-style-type: none"> Friday, 03/07/14 at 9:00 am in Dept. 303 for filing of the Inventory & Appraisal; Friday, 12/05/14 at 9:00 am in Dept. 303 for filing of the Accounting/Report of Executor and Petition for Final Distribution <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>	

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

		TEMP EXPIRES 11-18-13	NEEDS/PROBLEMS/COMMENTS:
		ATHENA HOWARD , Maternal Aunt, is Petitioner.	<p>1. If notice is not excused per Declarations of Due Diligence, need proof of service of Notice of Hearing with a copy of the petition on paternal grandparents per Probate Code §1511.</p> <p>Notes:</p> <ul style="list-style-type: none"> • Petitioner resides in Visalia, CA (Tulare County) with the minor. The minor previously resided with the parents in Fresno. • The pending Family Law dissolution case is Fresno Superior Court Case No. 13CEFL04969. • At hearing on 10-4-13 in 13CEFL04969, a five-year restraining order was granted protecting the mother and the minor from the father, to expire 10-30-18. • Minute Order 9-30-13 in this guardianship matter states the mother is in favor of the petition, temp extended to 11-18-13, general hearing remains on calendar for 11-18-13.
		Father: ALFRED G. ESPINOZA - Personally served 9-21-13	
		Mother: ARIELLE A. SORENSEN-ESPINOZA - Personally served 9-17-13 - Present at temp hearing on 9-30-13	
		Paternal Grandfather: Fred Espinoza - Declaration of due diligence filed 9-24-13	
		Paternal Grandmother: Auroa Garcia - Declaration of due diligence filed 9-24-13	
		Maternal Grandfather: Peter Sorenson - Served by mail 9-16-13	
		Maternal Grandmother: Janette Freeman - Served by mail 9-16-13	
		Petitioner states the minor has been sexually abused by her father. The father is delusional, unstable, and a drug addict. There is a current restraining order against the father, but in his irrational state, Petitioner fears that he will attempt to find and take the minor. The mother is not emotionally stable and is unsure about a permanent guardianship. The mother knew of the abuse for two years and did not report until a few days ago because she was afraid for her and her daughter's safety. She does not have a job and is currently pregnant. Attached is Domestic Violence Restraining Order dated 9-12-13 that expires at hearing on 10-4-13, as well as the request filed in 13CEFL04969 containing the details of the alleged abuse. The request also refers to a police case against the father. The minor has been in Petitioner's care since 9-11-13.	
		Court Investigator Dina Calvillo filed a report on 11-13-13.	
	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		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed by: skc	
		Reviewed on: 11-8-13	
		Updates: 11-13-13	
		Recommendation:	
		File 6 – Espinoza	

		MARION CHESNUT , beneficiary of the Testamentary Trust created under the Will of Mary J. Movsesian, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
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		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		<p>Petitioner states:</p> <ol style="list-style-type: none"> The Testamentary Trust was created pursuant to the "Decree of Final Distribution on Waiver of Accounting" filed 07/23/68 in Fresno Superior Court. The Order was recorded on 07/23/68 in the records of Fresno County. ERNEST MOSESIAN, LARRY MOSESIAN AND BURT MOSESIAN were appointed as Co-Trustees, or the survivor of them, of the Testamentary Trust for the benefit of Marion Chesnut. Ernest Mosesian passed away on 07/31/93, Larry Mosesian passed away on 08/19/06, and Burt Mosesian passed away on 11/02/01. The death of all trustees left a vacancy in the office of Trustee. The Trust does not provide for a successor trustee in the event of the deaths of the named trustees. Pursuant to Probate Code § 1566(d), the income beneficiary of the Trust, Marion Chesnut, has signed a Nomination of Successor Trustee and Waiver of Bond requesting that her daughter, Terry Brown, be appointed as the successor trustee to serve without bond. The Trust contains real property assets located in Fresno County. <p>Petitioner, requests that:</p> <ol style="list-style-type: none"> The Court appoint Terry Brown as successor trustee of the Testamentary Trust created under the Will of Mary J. Movsesian by that Decree of Final Distribution and Waiver of Accounting filed 07/23/98; That Terry Brown, as Successor Trustee, have all the powers under the terms of the Testamentary Trust created under the Will of Mary J. Movsesian, concerning the real property asset of the Trust. 	
			Reviewed by: JF
			Reviewed on: 11/12/13
			Updates:
			Recommendation:
			File 7 – Movsesian

DOD: 11-26-12	TERRY J. MOORE , Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Petitioner states Settlor Josephine Moore caused a deed to be recorded on 9-25-02 that conveyed her house on Bedford in Clovis to her three sons, James J. Moore, Franklin L. Moore, and Petitioner Terry J. Moore, in order to avoid probate. However when James J. Moore was killed in a vehicular accident, his one-third interest passed to his widow – a consequence not anticipated by Settlor. She therefore consulted counsel, who advised her to reacquire title to all interests in the property and convey it to a living trust. Accordingly a revocable living trust was established on 3-22-10.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
	<p>The two living sons deeded their respective interests back to their mother, who in turn conveyed them to the trust. James J. Moore's widow agreed to do so also, and after transfer from his estate to his trust pursuant to his will, Laura Mendes Moore, as trustee thereof, deeded that one-third interest back to Settlor Josephine Moore.</p> <p>Thereafter, Settlor Josephine Moore's health began to deteriorate, and upon consultation with a Medi-Cal advisor, a family decision was made to establish an irrevocable trust and transfer the property from the revocable trust to an irrevocable trust. Accordingly, the instant Josephine Moore Grantor Trust was created on 11-21-12.</p> <p>The Grantor Trust specifically transfers the property in its entirety, listed in Schedule A, to the Grantor Trust. On 11-28-12, Terry J. Moore, as successor trustee of the revocable trust, quitclaimed the property to himself as trustee of the Grantor Trust. However, no one noticed at the time that title to the property was not entirely vested in the revocable trust. The one-third interest was still vested in Settlor Josephine Moore's name individually.</p> <p>Petitioner states that it was his mother's stated intent to transfer her entire residence to the new Grantor Trust, and that it was her belief that she had done so.</p> <p>Petitioner requests that this Court confirm that the asset listed in Schedule A, namely the property, is an asset of the Grantor Trust subject to the management and control of Petitioner as its trustee, pursuant to and under the declaration that established the trust, and any other orders the Court deems just and proper.</p>	
		Reviewed by: skc
		Reviewed on: 11-12-13
		Updates:
		Recommendation:
		File 8 – Moore

Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 7-15-13	JOSEPH SALVADOR ESPINOSA , Son, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Because the garage tools and the wedding ring are included in the I&A, the Court may require receipts or some form of verification that these specific gifts have been received by the beneficiaries prior to passing the residue to Petitioner pursuant to the will.</p>
	40 day since DOD	
	No other proceedings	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	I&A: \$36,683.40 (real property interest and personal property)	
<input checked="" type="checkbox"/> Inventory		
<input type="checkbox"/> PTC	Will dated 9-10-04 devises the entire estate to Petitioner, with the exception of garage tools to George Espinosa, Jr., and wedding ring to Sandra Espinosa.	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	W	
<input type="checkbox"/> Aff.Pub.	Petitioner requests Court determination that the real property interest and personal property, with the exception of the garage tools and wedding ring, passed to Petitioner pursuant to Decedent's will.	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: skc
		Reviewed on: 11-12-13
		Updates:
		Recommendation:
		File 10 – Espinosa

DOD: 12/18/2012	<p>PAULA ROBINSON was appointed as Special Administrator with Limited IAEA authority and without bond on 6/17/2013.</p> <p>Letters of Special Administration expire on 11/18/2013.</p> <p>Petitioner was appointed for the limited purpose of pursuing actions to recover assets of the decedent held by others.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>Reviewed by: KT</p> <p>Reviewed on: 11/12/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11 – Crawford</p>	

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 10	<u>TEMPORARY EXPIRES 11/18/2013</u>	NEEDS/PROBLEMS/COMMENTS:
	DEBBIE WRIGHT , non-relative, is petitioner.	Minute Order of 10/28/2013: No appearances. The Court on its own motion extends the temporary to 11/18/2013.
	Father: ANDY CONTRERAS , served by mail on 07/16/2013	The following issues remain:
Cont. from 071513, 082013, 102813	Mother: LALAINA DELGADO	1. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:
Aff.Sub.Wit.	Paternal Grandfather: Unknown	<ul style="list-style-type: none"> Andy Contreras (Father) – was served by mail on 07/16/2013 however personal service is required pursuant to Probate Code § 1511. Lalaina Delgado (Mother)
✓ Verified	Paternal Grandmother: Mary Tapia, deceased	2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:
Inventory	Maternal Grandparents: Unknown	<ul style="list-style-type: none"> Paternal Grandfather Maternal Grandparents
PTC	Petitioner states: that she is the ex-girlfriend of the minor's father. She states that on 05/02/2013, Social Worker, Staci Moffatt, appeared at her home and informed her that she is not legally able to administer the minor's daily medication for ADHD and that guardianship would be required. Petitioner alleges that the child's father was arrested at the petitioner's home on 03/10/2013 and currently remains incarcerated on two counts of indecent exposure. The father attended a hearing on 11/10/2011 in Kings County for indecent exposure. Petitioner alleges that the father was exposing himself and masturbating in public where children were present. Petitioner states that the mother left the child when he was nine months old and has only spoken with his mother once in his life. Petitioner alleges that the paternal aunt, Yadira Sanchez, has had the child reside with her at times however the child informed the petitioner that his fifteen year old cousin has been molesting him since he was four years old in his aunt's home.	
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		
	Declaration filed 07/17/2013 which include numerous letters in support of the petition for guardianship.	
	DSS Investigator Keith M. Hodge, DSS, and Staci Moffatt, DSS, report filed 08/14/2013.	
		Reviewed by: LV
		Reviewed on: 11/13/2013
		Updates:
		Recommendation:
		File 12 – Contreras

Atty Speer, Jeoffery (pro per – son/Petitioner)

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

DOD: 04/12/13		<p>JEOFFERY SPEER, son, is Petitioner and requests appointment as Administrator without bond.</p> <p>Full IAEA - OK</p> <p>Decedent died intestate</p> <p>Residence: Fresno Publication: NEED</p> <p>Estimated Value of the Estate: Personal property - \$ 23,500.00 Real property - 318,393.00 Total - \$341,893.00</p> <p>Probate Referee: RICK SMITH</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Petitioner requests appointment without bond. Need waiver of bond from all beneficiaries or bond in the amount of \$341,893.00. The petition indicates that the decedent had a predeceased spouse. Name and date of death of predeceased spouse should be listed in item 8 of the Petition pursuant to Local Rule 7.1.1D. It is noted that there is a death certificate for Mary Susana Speer attached the Petition, however, it is unclear whether this is the decedent's predeceased spouse as Mary Susana Spouse is not listed in item 8 of the Petition. Need the relationships to decedent of each person listed in item 8 of the Petition. Note: Petitioner's name and relationship should also be listed in item 8 of the Petition. <p>Note: If the Petition is granted, status hearings will be set as follows:</p> <ol style="list-style-type: none"> Friday, 04/18/14 at 9:00 am in Dept. 303 for filing of the Inventory & Appraisal; Friday, 01/16/15 at 9:00 am in Dept. 303 for filing of the Accounting/Report of Executor and Petition for Final Distribution <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter, the status hearing will come off calendar and no appearance will be required.</p>
Cont. from			
<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/o		
<input checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: JF	
		Reviewed on: 11/08/13	
		Updates:	
		Recommendation:	
		File 13 – Speer	

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 10 years	THERE IS NO TEMPORARY. Temporary was denied.	NEEDS/PROBLEMS/COMMENTS:
	ANA ROSA BARRAZA , maternal aunt, is petitioner.	1. Need Notice of Hearing.
Cont. from	Father: SAMUEL IBARRA ALANZO	2. Need proof of personal service of the Notice of Hearing along with a copy of the temporary petition or Consent and Waiver of Notice or Declaration of Due Diligence on:
<input type="checkbox"/> Aff.Sub.Wit.	Mother: VERONICA BARRAZA HURTADO	a. Samuel Ibarra Alanzo (father)
<input checked="" type="checkbox"/> Verified	Paternal grandparents: Not listed	b. Veronica Barraza Hurtado (mother)
<input type="checkbox"/> Inventory	Maternal grandparents: Not listed	3. Need proof of service of the Notice of Hearing along with a copy of the temporary petition or Consent and Waiver of Notice or Declaration of Due Diligence on:
<input type="checkbox"/> PTC	Petitioner states mom is in jail and the father's visits with the child are prohibited by the court and is not able to keep the child because of his domestic violence record. Petitioner states she does not know how long her sister will be in jail and she needs a temporary guardianship to be able to take the child to school and the doctor.	a. Paternal grandparents
<input type="checkbox"/> Not.Cred.		b. Maternal grandparents
<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 checked="" type="checkbox"/> Conf. Screen	Court Investigator Jennifer Young's Report filed on 11/12/13.	
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 11/12/13
		Updates:
		Recommendation:
		File 14 – Barraza

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 15 years	THERE IS NO TEMPORARY. No temporary was requested.	NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 2. Need proof of personal service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice on: a. Andrew Contreras (minor) b. Guadalupe Contreras (father) – unless the court dispenses with notice. 3. Need proof of service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: a. David Herrera (maternal grandfather) b. Carol Herrera (maternal grandmother) c. Paternal grandfather d. Esther Ramirez (paternal grandmother) – unless the court dispenses with notice.
	BRIAN KEY , non-relative (mom's longtime boyfriend), is petitioner.	
Cont. from	Father: GUADALUPE CONTRERAS – Declaration of Due Diligence filed on 9/13/13	
<input type="checkbox"/> Aff.Sub.Wit.	Mother: BARBARA RAMIREZ – Deceased	
<input checked="" type="checkbox"/> Verified	Paternal grandfather: Not listed	
<input type="checkbox"/> Inventory	Paternal grandmother: Esther Ramirez – Declaration of Due Diligence.	
<input type="checkbox"/> PTC	Maternal grandfather: David Herrera	
<input type="checkbox"/> Not.Cred.	Maternal grandmother: Carol Herrera	
<input type="checkbox"/> Notice of Hrg	Petitioner states the child has lived with him since the death of his mother. The minor needs some dental work and he is not covered by Petitioner's work insurance. The guardianship would be in the best interest of the minor.	
<input type="checkbox"/> Aff.Mail	Court Investigator Jennifer Daniel's Report filed on 11/8/13.	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 11/12/13
		Updates:
		Recommendation:
		File 15 – Contreras

16 Alexander Alcocer, Antonio Alcocer, Jr., and Melina Alazay Alcocer (GUARD/P)

Case No. 13CEPR00965

Atty Negrette, J. Jesus Alcocer (Pro Per – Paternal Grandfather – Petitioner)
Atty Alcocer, Teresita Granados (Pro Per – Paternal Grandmother – Petitioner)

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Alexander, age 9	<p>GENERAL HEARINGF 1-8-14</p> <p>J. JESUS ALCOCER NEGRETTE and TERESITA GRANADOS ALCOCER, Paternal Grandparents, are Petitioners.</p> <p>Father: ANTONIO ALCOCER Mother: JASMIN ARREOLA</p> <p>Maternal Grandparents: Unknown</p> <p>Petitioners state they need temporary guardianship because the school and the doctor are asking for legal paperwork. The parents have abandoned the children. The mother is currently in Mexico with a different mate and was neglecting the children. The father left and they have not heard from him in six years. According to the UCCJEA, the minors have lived with Petitioners since 2010.</p> <p>Petitioners request the Court excuse notice to the parents because the father is nowhere to be found and the mother is in Mexico and is willing to sign the guardianship.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. If notice is not excused, need Notice of Hearing and proof of service of Notice of Hearing with a copy of the temp petition on both parents per Probate Code §2250(e), or consent and waiver of notice, or declarations of due diligence.</p>	
Antonio Jr., age 10			
Melina, age 8			
Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			X
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			X
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
<input checked="" type="checkbox"/> Order			
Aff. Posting			
Status Rpt			
<input checked="" type="checkbox"/> UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: skc</p> <p>Reviewed on: 11-12-13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 16 – Alcocer</p>	

Petition for Appointment of Temporary Conservatorship of the Person and Estate

Age: 84		<p>GENERAL HEARING 12-19-13</p> <p>SHELIA STEARNS, Daughter, is Petitioner and requests appointment as Temporary Conservator of the Person and Estate with bond fixed at \$50,000.00 and \$425,000.00 to be held in a blocked account.</p> <p>Estimated value of estate: Personal property: \$ 475,000.00 Annual income: \$ 10,000.00 Cost of recovery: \$ 48,500.00 Total bond: \$ 533,500.00</p> <p>Petitioner states ??? (Temp petition references an attachment, but there is nothing attached.)</p> <p>Court Investigator Jennifer Young to advise rights, provide report.</p>	NEEDS/PROBLEMS/COMMENTS:	
			Note: Petitioner resides in Prescott, AZ.	
			Court Investigator to advise rights.	
Aff.Sub.Wit.			1. Need Duties of Conservator and Acknowledgment of Receipt of Handbook for Conservators (Form GC-348).	
<input checked="" type="checkbox"/>	Verified		2. Need Notice of Hearing.	
	Inventory		3. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing on the proposed Conservatee Beverly Dois Cook.	
	PTC		4. Need proof of service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing on all relatives:	
	Not.Cred.		- Patricia Ungewitter (Sister)	
	Notice of Hrg		- Benjamin Stearns (Grandson)	
	Aff.Mail		- Daniel Stearns (Grandson)	
	Aff.Pub.		- Jessica O'Connor (Granddaughter)	
	Sp.Ntc.		- James Stearns (Grandson)	
	Pers.Serv.		- Rebecca Lee (Granddaughter)	
<input checked="" type="checkbox"/>	Conf. Screen		5. Petitioner requests bond of \$50,000.00 with \$425,000.00 to be held in the blocked account. The Court may require clarification as to the nature of the personal property assets, since Petitioner states there is \$475,000.00 in personal property and \$10,000.00 in annual income, which would require bond of \$533,500.00 pursuant to Probate Code §2320(c)(4) and Cal. Rules of Court 7.207.	
	Letters		6. Need Temp Order.	
	Duties/Supp		7. Need Order to Deposit Money Into Blocked Account (MC-355).	
	Objections		8. Need Temp Letters. (Need bond prior to issuance of letters.	
	Video Receipt			
	CI Report			
	9202			
	Order			
	Aff. Posting	Reviewed by: skc		
	Status Rpt	Reviewed on: 11-12-13		
	UCCJEA	Updates:		
	Citation	Recommendation:		
	FTB Notice	File 17 – Cook		

Status Hearing Re: Filing of the Final/Supplemental Account and/or Petition for Final Distribution

DOD: 08/28/11	<p>SUSAN J. QUINN and RHONDA WALLACE, were appointed Co-Executors without bond on 11/08/11. Letters were issued on 11/21/11.</p> <p>Inventory & Appraisal, Final filed 04/10/12 - \$499,722.31</p> <p>Inventory & Appraisal, Supplemental filed 04/18/13 - \$41,158.54</p> <p>First & Final Account and Report of Executor filed 10/09/12 and set for hearing on 11/19/12.</p> <p>Minute Order from 11/19/12 set this matter for status and states: The Court advises counsel that it is treating this as a Petition for Preliminary Distribution. The Court grants a distribution of up to 80% of the estate and compensation. Counsel is directed to submit a revised order.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 09/13/13</p> <p>1. Need Final/Supplemental Account and/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>
Cont. from 091313		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>Reviewed by: JF</p> <p>Reviewed on: 11/08/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 18 - Quinn</p>	

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

DOD: 04/30/2013		<p>MARGUERITE HUGHES, niece is petitioner and requests appointment as Administrator with will annexed with bond set at \$550,000.00.</p> <p>Full IAEA – o.k.</p> <p>Will dated: 08/19/2000</p> <p>Residence: Reedley Publication: Reedley Exponent</p> <p>Estimated value of the Estate: Personal property \$550,000.00</p> <p>Probate Referee: Steven Diebert</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Friday, 12/20/2013 at 9:00a.m. in Dept. 303 for the filing of the bond and Friday, 04/18/2014 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Friday, 01/16/2015 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
Cont. from 093013, 110413, 111213			
✓	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg w/		
✓	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: 11/13/2013			
Updates:			
Recommendation: Submitted			
File 19 – Peters			

1 Fred Erwin Davis (Estate)

Case No. 10CEPR00810

Atty Dias, Michael A. (for Lynette Lucille Duston and Warren Leslie Davis – Son – Petitioner)

Atty Farley, Michael L., and Sullivan, Robert L., Jr., (for Mary M. Davis – Executor)

Status Hearing Re: Settlement Agreement

DOD: 7-9-10	<p>LYNETTE LUCILLE DUSTON and WARREN LESLIE DAVIS filed Second Amended Petition for: (1) Removal of Mary M. Davis as Executor of the Estate; (2) Compelling Account and Report of Administration of Estate; (3) Appointment of Lynette Lucille Duston and Warren Leslie Davis as Successor Co-Executors of Estate.</p> <p>MARY M. DAVIS, Executor, filed Amended First and Final Account and Report of Executor and Amendment to Petition for its Settlement, for Allowance of Ordinary Executor Commissions, Ordinary and Extraordinary Attorneys' Fees and for Final Distribution.</p> <p>At settlement conference on 10-29-13, the parties reached complete resolution of all claims known and unknown. Upon inquiry by the Court, each party individually agreed to the terms and conditions of the settlement. Counsel was directed to prepare the necessary documents.</p> <p>The Court set this status hearing re settlement agreement.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: This matter will be heard at 10:00 am.</p> <ol style="list-style-type: none"> Need Settlement Agreement. Need Order for Final Distribution.
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>Reviewed by: skc</p> <p>Reviewed on: 11-13-13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1 – Davis</p>	