

(1) Eighth and Final Account and (2) Report of Conservator and (3) Petition for Allowance of Compensation to Conservator, Attorneys' Fees and Costs, (4) Delivery of Assets and (5) Termination of Conservatorship

DOD: 11/30/12	BARBAR BIGELOW , Conservator, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 10/15/13</u></p> <p>As of 11/13/13, nothing further has been filed.</p> <ol style="list-style-type: none"> Petitioner requests to distribute the remaining assets in the conservatorship estate pursuant to Probate Code § 13000. Therefore need affidavit from each person entitled to distribution.
	Account period: 03/01/11 – 07/31/13	
Cont. from 101513	Accounting - \$155,931.63	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$13,693.18	
<input checked="" type="checkbox"/> Verified	Ending POH - \$18,888.48	
<input type="checkbox"/> Inventory	Conservator - \$840.00	
<input type="checkbox"/> PTC	Attorney - \$1,123.59	
<input type="checkbox"/> Not.Cred.	(\$1,005.00 for this accounting period (2.75 hrs. @ \$300/hr. and 1.5 hrs. @ \$120/hr.) plus \$118.59 previously approved unpaid fees from previous accounting period)	
<input checked="" type="checkbox"/> Notice of Hrg	Costs - \$513.00 (filing fees, courtcall)	
<input checked="" type="checkbox"/> Aff.Mail w/	Reserve - \$800.00 (for preparation of final tax returns)	
<input type="checkbox"/> Aff.Pub.	Petitioner requests to distribute the remaining assets pursuant to Probate Code § 13000, as follows:	
<input type="checkbox"/> Sp.Ntc.	Barbara Bigelow - \$5,203.96	
<input type="checkbox"/> Pers.Serv.	Dianne Andrews - \$5,203.96	
<input type="checkbox"/> Conf. Screen	Roger Peterson - \$5,203.96*	
<input type="checkbox"/> Letters	*Roger Peterson suffers from disabilities, the conservator requests permission to distribute the share allocated for Roger Peterson to the Barbara Bigelow as trustee of a special needs trust established for his benefit under the conservatee's living trust.	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 2620(c)		
<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: 11/13/13
		Updates:
		Recommendation:
		File 1 - Peterson

(1) First and Final Report of Conservator of the Person and Estate and (2) for Termination of Conservatorship and (3) for Delivery of Assets [Prob. C. 2631]

DOD: 2/12/2013		<p>DELIA CHACON, mother and Conservator of the Person and Estate, is Petitioner.</p> <p>Petitioner states:</p> <ul style="list-style-type: none"> On 1/17/1990, the Court ordered the Petitioner excused from filing an accounting until the conditions of Probate Code § 2628 are no longer met; The conditions of Probate Code § 2628 have been met throughout the conservatorship proceeding; Conservatee was a public assistance recipient until her death on 2/12/2013; The following actions represent the only ones taken during the period of conservatorship: <ol style="list-style-type: none"> At the inception of the Conservatorship of the Estate on 9/8/1988, Petitioner received approval to purchase a single family residence in the joint names of herself and the Conservatee (<i>please see Order [dated 9/8/1988] attached as Exhibit A</i>); An <i>Inventory and Appraisal</i> was filed 11/8/1988 reflecting an appraised value of the Conservatee's interest in the real property to be \$18,000.00 (<i>copy attached as Exhibit B</i>); On 1/17/1989, the Court entered its order excusing accountings pursuant to Probate Code § 2628 (<i>copy attached as Exhibit C</i>); <p align="center">~Please see additional page~</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Paragraph 9 of the <i>First and Final Report</i> states an <i>Affidavit Re Real of Small Value</i> shall be executed by Petitioner at such time as 6 months have elapsed from the date of Conservatee's death; a copy of the executed <i>Affidavit</i> shall be submitted to the Court with a Declaration of Petitioner prior to the hearing. Court records do not show a copy of the executed <i>Affidavit</i> with a Declaration of Petitioner has been filed with the Court; however, Court records show Petitioner Delia Chacon filed the <i>Affidavit Re Real of Small Value</i> with the Court on 8/26/2013 in Case 13CEPR00002.—<i>Declaration filed 11/18/2013 contains copy attached of Affidavit of Real Property filed with the Court 8/26/2013.</i></p> <p>Note: <i>Creditor's Claim</i> was filed on 5/10/2013 by the Department of Health Services (DHS) in the amount of \$27,124.43. Paragraph 11 of the <i>First and Final Report</i> states the DHS has filed a <i>Request for Special Notice</i> in this proceeding, that Petitioner as sole heir of the estate of the Conservatee is preparing a Hardship Waiver application for submission to DHS, and that it is anticipated that Petitioner shall have a decision from DHS prior to the hearing in this matter. Petitioner has not provided information regarding the current status of said Hardship Waiver application, except to state in the proposed <i>Order Settling First and Final Report</i> that determination of the DHS acceptance of the Waiver has not yet been received. <i>Proof of Service by Mail of the Notice of Hearing</i> filed 8/15/2013 shows notice was served to the Department of Health Care Services pursuant to the <i>Request for Special Notice</i> filed 5/10/2013 on 8/14/2013. Court may wish to continue the matter pending receipt of DHS waiver determination, or strike the language in the proposed order regarding the unresolved DHS waiver.—<i>Revised Order submitted 11/18/2013 strikes DHS waiver language.</i></p>	
Cont. from 081313				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W /
<input type="checkbox"/>	Aff.Pub.			
<input checked="" 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>Reviewed by: LEG</p> <p>Reviewed on: 11/12/13</p> <p>Updates: 11/18/13</p> <p>Recommendation:</p> <p>File 2 – Ramirez</p>		

Petitioner states, continued:

Actions taken during the period of conservatorship, continued:

- (4) On 4/5/1991, the Court entered an order authorizing the Conservator to compromise a claim of the Conservatee, who was involved in an automobile accident; pursuant to the Order (*copy attached as Exhibit D*), the Conservatee was authorized to purchase an automobile in the name of Petitioner, using **\$3,000.00** of the funds recovered, and to deposit the balance, after payment of expenses into a blocked account in the name of the Conservatorship; Petitioner purchased a 1986 Chevrolet Spectrum in her name alone and deposited **\$3,162.90** into a blocked account (*copy of Receipt and Agreement by Depository dated 5/10/1991 attached as Exhibit E*);
- (5) On 6/23/2003, the Court ordered withdrawal of funds from the blocked account [in the sum of **\$3,949.38** for funeral insurance policy (\$3,549.38) and approved attorney fees (\$400.00) (*copy attached as Exhibit F*);
- The only asset of the conservatorship estate is a ½ interest in a single family residence at 210 N. Fourth Street in Fresno, the appraised value of which at the date of Conservatee's death was **\$47,500.00** (*Reappraisal attached as Exhibit H*);
 - The Conservatee had no Will, no spouse nor children living or deceased; her only heir is her mother, the Petitioner;
 - An *Affidavit Re Real of Small Value* shall be executed by Petitioner at such time as 6 months have elapsed from the date of Conservatee's death; a copy of the executed *Affidavit* shall be submitted to the Court with a Declaration of Petitioner prior to the hearing;
 - Petitioner has provided extensive services to the conservatorship during this account period by paying bills of the Conservatee, collecting all assets due to the Conservatee, and taking care of Conservatee's physical and medical needs; Petitioner waives her right to compensation as Conservator.

Petitioner prays for an order:

1. Approving and settling the First and Final Report;
2. Approving and confirming all acts of the Petitioner as Conservator relating to the conservatorship; and
3. Authorizing and directing the Petitioner to deliver the property remaining in her possession to Delia Chacon, and that on delivering the property and filing proper receipts the Conservator of the person and estate be discharged.

3 Esperanza Diaz (Estate)

Case No. 06CEPR00995

Atty LeVan, Nancy J. (for Petitioner/Administrator Daniel Diaz)

(1) Report and Final Account of Administrator, (2) Petition for Reimbursement to Administrator for Costs Advanced and (3) Attorney's Compensation and (4) for Final Distribution

DOD: 4/5/2000	DANIEL DIAZ , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Petition request distribution of 1/5 interest in the estate to the decedent's grandson, Joseph Diaz, son of James Diaz. At the time the estate was opened in 2006 James Diaz, son, was alive and therefore his share of the estate must be distributed to him or his estate and not to his son, Joseph Diaz.
	Account period: 10/24/06 – 8/31/13	
Cont. from 102213	Accounting - \$23,000.00	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$23,000.00	
<input checked="" type="checkbox"/> Verified	Ending POH - \$23,000.00	
<input checked="" type="checkbox"/> Inventory	Administrator - waives	
<input checked="" type="checkbox"/> PTC	Attorney (statutory) - \$920.00	
<input checked="" type="checkbox"/> Not.Cred.	Costs - \$1,065.00	
<input checked="" type="checkbox"/> Notice of Hrg	(filing fees, publication, probate referee, certified copies)	
<input checked="" type="checkbox"/> Aff.Mail		
Aff.Pub.		
Sp.Ntc.	Distribution, pursuant to intestate succession, is to:	
Pers.Serv.	Virginia Macias, Daniel Diaz, Rachael Garcia, Patricia Contreras and Joseph Diaz, 1/5/ interest each in real property.	
Conf. Screen		
<input checked="" type="checkbox"/> Letters 10/24/06		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	Reviewed by: KT	
	Reviewed on: 11/12/13	
	Updates:	
	Recommendation:	
	File 3 – Diaz	

(1) Second Account and Report of Conservator, (2) Petition for Settlement, (3) Reimbursement for Mileage, (4) Commissions and Fees to Conservator and Attorney

Age: 58 years	BRYAN JENSEN, Conservator, is petitioner.		NEEDS/PROBLEMS/COMMENTS: OFF CALENDAR. Amended Petition filed and set for hearing on 1/9/2014.
	Account period: 1/1/11 – 12/31/12		
Cont. from 100213, 101513	Accounting	- \$99,385.86	1. Disbursement schedule shows payments to the Conservator, for court ordered mileage and commissions, in the amount of \$6,762.00 on 5/26/11. Schedule D also shows payment to the conservator of \$6,762.00. Therefore, since Schedule B (disbursements) and Schedule D (disposition of Harry Jensen Estate) are both listed in the same column in the summary of account and are included in the total credits, it appears the conservator has been paid twice for his commissions and mileage. – Declaration filed on 10/10/13 states Schedule D does not show additional payments made to the attorney, it simply shows the net proceeds of the undivided 1/3 interest received from the estate of Harry Jensen and transferred to the Special Needs Trust for the benefit of Debra Jensen. Please see additional page
	Beginning POH	- \$57,863.35	
	Ending POH	- \$ 2,841.05	
Aff.Sub.Wit.	Conservator	- \$3,090.50	
✓ Verified	(72 hours @ \$25.00 per hour and 3910 miles @ \$.55 per mile)		
Inventory	Attorney	- \$1,250.00	
PTC	(per Local Rule)		
Not.Cred.	Current bond is \$25,988.66. Petitioner request bond be reduced to \$20,000.00.		
✓ Notice of Hrg	Petitioner prays for an Order:		
✓ Aff.Mail	1. Approving, allowing and settling the second account.		
Aff.Pub.	2. Authorizing the conservator commissions in the amount of \$3,090.00		
Sp.Ntc.	3. Authorizing attorney in the amount of \$1,250.00.		
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
✓ 2620(c)			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
			Reviewed by: KT
			Reviewed on: 11/13/13
			Updates:
			Recommendation:
			File 4 – Jensen

NEEDS/PROBLEMS/COMMENTS (cont.):

1. Disbursement schedule shows payments to the attorney, for court ordered fees, in the amount of \$2,945.00 on 6/7/11. Schedule D also shows payment of \$2,945.00 to the attorney. Therefore, since Schedule B (disbursements) and Schedule D (disposition of Harry Jensen Estate) are both listed in the same column in the summary of account and are included in the total credits, it appears the attorney has been paid twice for his fees. – **Declaration filed on 10/10/13** states Schedule D does not show additional payments made to the attorney, it simply shows the net proceeds of the undivided 1/3 interest received from the estate of Harry Jensen and transferred to the Special Needs Trust for the benefit of Debra Jensen. – **Examiner note:** With the explanation provided in the Declaration filed on 10/10/13 the accounting does not balance.

Note: If the petition is granted, a status hearing will be set as follows:

- **Friday, February 6, 2015** at 9:00 a.m. in Department 303, for the filing of the third account.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

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

DOD: 12/07/11	KIRK HAGOPIAN , was appointed as Administrator with full authority and without bond on 07/26/12. Letters of Administration were issued on 08/01/12.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 11/01/13</u> Minute Order from 11/01/13 states: Matter continued to 11/19/13. Counsel's presence is excused for the next hearing.</p> <p>1. Need First Account and/or Petition for Final Distribution.</p> <p>Note: Administrators Petition for Order Compelling Respondents to Account to Administrator; For Order Directing Transfer of Personal Property to Administrator or Decedent's Estate; and for Damages has been continued to 01/08/14.</p> <hr/> <p>Reviewed by: JF</p> <p>Reviewed on: 11/13/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 5A – Smart</p>
	Inventory & Appraisal, partial no. 1 filed 05/31/13 - \$80,268.71	
Cont. from 090613, 110113	Inventory & Appraisal, partial no. 2 filed 05/31/13 - \$62,337.78	
Aff.Sub.Wit.	Minute Order from 07/26/12 set this matter for status regarding filing of the Accounting and/or Petition for Final Distribution.	
Verified	Petition for Order Compelling Respondents to Account to Administrator; For Order Directing Transfer of Personal Property to Administrator or Decedent's Estate; and for Damages filed by Administrator on 10/09/13.	
Inventory	Report Regarding Status filed 10/17/13 by attorney Jeffrey Wall states: The Administrator retained Leigh Burnside to represent the estate in a proceeding to recover estate assets that may have been taken by Gaylene Bolanos and possibly others acting in concert with Ms. Bolanos. The Petition under Probate Code § 850 seeks to require Gaylene Bolanos and others to account for various estate assets that were entrusted to Ms. Bolanos that are now unaccounted for. The Petition further requests an Order directed the said parties to transfer any estate assets in their possession to the Administrator. There is an ongoing investigation of the parties being conducted by detectives at the Fresno Police Department.	
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		

Atty Maroot, Phillip K., of Maroot & Hardcastle, Hanford (for Petitioner Kevin Conley)

(1) Report of Executor on Waiver of Account and Petition for Final Distribution and (2) Waiver of Compensation to Executor and (3) for Allowance of Compensation to Attorney for Ordinary Services

DOD: 6/26/2012		KEVIN CONLEY , son and Executor, is Petitioner.	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Note: <i>Petition</i> does not include specific information regarding the increment(s) or date(s) the preliminary distributions of \$86,936.00 were made by the Petitioner to himself. Petitioner's preliminary distributions appear not to have met the Probate Code § 10520(a) type of property, nor the 10520(c) type of property. In addition, Probate Code § 11623 provides a personal representative with full IAEA authority may petition the court for an order for preliminary distribution on notice. Despite the irregular preliminary distributions by Petitioner without Court authorization, it appears no loss or injury has been suffered by the estate, creditors, or any interested persons per Probate Code § 10520, based upon the assertions in the <i>Petition</i> as to creditors and upon the agreement between beneficiary Kemp Conley and the Petitioner.</p> <p>~Please see additional page~</p> <p>Reviewed by: LEG</p> <p>Reviewed on: 11/13/13</p> <p>Updates: 11/18/13</p> <p>Recommendation:</p> <p>File 6 – Conley</p>
		Accounting is waived.	
		I & A — \$676,133.06	
		POH — [\$470,678.00] (\$20,678.99 is cash)	
Cont. from			
	Aff.Sub.Wit.	Executor waives (Waiver by Executor of Compensation filed 10/15/2013.)	
✓	Verified		
✓	Inventory	Attorney — \$16,522.66 (statutory)	
✓	PTC		
✓	Not.Cred.	Costs — \$900.00 (accountant fees to Monica Mata, estate accountant)	
✓	Notice of Hrg	Petitioner states:	
✓	Aff.Mail	<ul style="list-style-type: none"> Petitioner made a preliminary distribution of Decedents household furnishings, furniture, and personal effects, pursuant to an outside agreement between Petitioner and KEMP CONLEY, son and beneficiary, in which they divided the tangible personal property between them [consisting of furniture; vehicles]; Petitioner spent considerable time and personal expenses in refurbishing Decedent's home residence and acreage planted with pomegranates and persimmon trees, with total acreage of 11.65 acres in Sanger (Home Ranch); Petitioner and Kemp Conley, sole estate beneficiaries, agree that the Home Ranch is worth in excess of \$450,000.00 notwithstanding the Probate Referee's appraisal of \$350,000.00; they have been in the process of selling the Home Ranch property but have not consummated a sale prior to filing this Petition; In order to not further delay the closing of this estate, Petitioner and Kemp Conley have agreed to sell the Home Ranch property after final distribution of the estate; <p>~Please see additional page~</p>	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters 090712		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
✓	FTB Notice		

Petitioner states, continued:

- Petitioner has made certain preliminary distributions without prior authorization of the Court, and requests confirmation of these distributions in accordance with the agreement of the sole beneficiaries of the estate as follows: Petitioner and Kemp Conley are sole beneficiaries of the estate and have agreed that certain cash distributions could be made to Petitioner provided that Kemp Conley be credited with ½ of all such distributions on final distribution of the estate; Petitioner and Kemp Conley have agreed that the total amount of such cash distributions was **\$86,936.00**, and each has agreed that ½ or **\$43,492.00** is the sum to which Kemp Conley shall be entitled on distribution of the estate; **Petitioner requests and each of the beneficiaries agree** that on final distribution of the estate an order be issued confirming the execution by Petitioner Kevin Conley, as an individual, of a Promissory Note payable in the amount of **\$43,492.00** [*@ 6% interest*], and the Note shall be secured by a Deed of Trust on the Home Ranch [*Please refer to Amendment to Report of Executor to be filed 11/18/2013, containing attached Exhibit A -- copy of Promissory Note, and Exhibit B -- copy of Deed of Trust*];
- On 5/12/2012, Decedent executed a promissory note to Wells Fargo Bank in the original amount of **\$134,000.00** secured by a Deed of Trust with respect to a real estate loan for the financing of a home residence located on South Avenue in Parlier (Parlier Loan) [*Note: this residence is not an estate asset*]; the loan was obtained for **DAWN KAPRIELIAN**, a friend of the Decedent, for her benefit; the Parlier Loan was obtained in Decedent's name alone as required by the lending company; Decedent then executed a Grant Deed on 5/21/2012 naming himself and Dawn Kaprelian as joint tenants with right of survivorship; upon recording of an *Affidavit of Death of Joint Tenant* following Decedent's death, title to this property is now solely in Dawn Kaprelian's name; however, the Parlier Loan remains in Decedent's name; Petitioner and Kemp Conley have agreed that Petitioner, who also resides at the said Parlier home residence, and Dawn Kaprelian, will assume and indemnify Kemp Conley and the estate for any liability and obligation arising out of the Parlier Loan; by an agreement approved by Kemp Conley, the Petitioner and Dawn Kaprelian have executed an assumption and indemnification agreement with respect to all Parlier Loan obligations. (*Please refer to Amendment to Report of Executor to be filed 11/18/2013, containing attached Exhibit C -- copy of Indemnification Agreement*).

Petitioner requests:

1. Administration of the estate be closed without an accounting;
2. All acts, proceedings and transactions of Petitioner as Executor be ratified, approved and confirmed;
3. The final distribution requested in the *Petition* be granted and the estate distributed as set forth:
Distribution pursuant to Decedent's Will is to:
 - **KEVIN CONLEY – \$1,628.16 cash**, an undivided ½ interest in 6.58 acre parcel of real property, and an undivided ½ interest in 11.55 acre parcel of real property.
 - **KEMP CONLEY – \$1,628.16 cash**, an undivided ½ interest in 6.58 acre parcel of real property, and an undivided ½ interest in 11.55 acre parcel of real property.
4. Petitioner be authorized and directed to pay **\$16,522.66** in fees to K. Phillip Maroot as statutory compensation for services to Petitioner and to the estate;
5. Confirmation of the preliminary distributions to Kevin Conley and the corresponding execution of a promissory note payable to Kemp Conley to equalize such distributions, said promissory note to be secured by a deed of trust against the Home Ranch;
6. Confirmation of the agreement by Kevin Conley and Dawn Kaprelian to assume and indemnify the estate and Kemp Conley of any liability or obligation arising out of the "Parlier Loan;"
7. All other property of Decedent and of the estate not now known or discovered be distributed to Kevin Conley and Kemp Conley without further order of the Court.

Dept. 303, 9:00 a.m. Tuesday, November 19, 2013

(1) First and Final Account and Petition for Settlement Thereof and (2) for Allowance of Statutory Attorney's Fees and (3) for Allowance of Statutory Executor's Fees and (4) for Reimbursement of Costs Advanced and (5) Final Distribution

DOD: 1-2-13		<p>MIYUKI LAPPEN, Executor without bond, is Petitioner.</p> <p>Account period: 1-2-13 through 9-25-13</p> <p>Accounting: <i>Not provided</i> Beginning POH: \$332,464.14 Ending POH: \$349,399.62 (cash)</p> <p>Executor (Statutory): \$9,987.98</p> <p>Attorney(Statutory): \$9,987.98</p> <p>Costs: \$1,192.37 (filing, publication, certified letters, appraisal)</p> <p>Creditor's Claims: Petitioner requests authorization to pay the following two creditor's claims in settlement of the two creditor claims filed:</p> <ul style="list-style-type: none"> \$4,656.78 to Central Valley Care, Inc., (Claim filed 6-20-13) \$5,414.26 to Miyuki Lappen (Executor, claim for funeral costs filed 5-13-13). <p>Distribution pursuant to Decedent's will:</p> <p>Miyuki Lappen, Trustee of the Merika Motoyoshi Revocable Trust: \$318,160.25</p>	<p>NEEDS/PROBLEMS/COMMENTS: CONTINUED TO 1-13-14 Per Attorney request.</p> <ol style="list-style-type: none"> The accounting is not in the form required by Probate Code §1060. Specifically, the summary does not contain totals, and no additional schedules are provided. <u>Note:</u> If accounting is to be waived, need waiver from Ms. Lappen as trustee of the trust and schedules with required information pursuant to Cal. Rules of Court 7.550. Petitioner is also the trustee of the trust to whom the estate will be distributed. Therefore, notice to the beneficiaries is required pursuant to Probate Code §1208(b). Petitioner did not submit Allowance or Rejection of Creditor's Claim regarding the two claims pursuant to Probate Code §§ 9251, 9252. The Court may require the Mandatory Judicial Council Form DE-174 to be submitted for formal allowance. (Form include proof of mailing to creditor.) Need clarification: I&A lists various securities. Petitioner states the property on hand is \$349,399.62 cash; however, Petitioner does not include a statement as to changes in form of assets. Need trustee's declaration pursuant to Local Rule 7.12.5. 	
Aff.Sub.Wit.				
✓	Verified			
✓	Inventory			
✓	PTC			
✓	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			w
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			3-29-13
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
✓	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
✓	FTB Notice			
		Reviewed by: skc		
		Reviewed on: 11-12-13		
		Updates:		
		Recommendation:		
		File 8 – Motoyoshi		

DOD: 6/16/2013		<p>YOLANDA HAUSCHEL, ANITA OAXACA and NORMA VIGIL are petitioners.</p> <p>40 days since date of death.</p> <p>No other proceedings.</p> <p>Will dated: June 11, 2013 devises the residue of the estate to Yolanda Haushel, Anita Oaxaca and Norma Vigil.</p> <p>I & A - \$75,000.00</p> <p>Petitioners request Court determination that Decedent's interest in real property pass to them.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need attachment 11 containing the decedent's interest in the real property. 2. Need attachment 13 the specific property interest claimed by each petitioner. 3. Order passes the property to petitioners in joint tenancy with rights of survivorship. The order should pass the property to each petitioner as tenants in common. Need revised order.
Cont. from 100813			
<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>Reviewed by: KT</p> <p>Reviewed on: 11/14/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 9 - Lopez</p>	

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

DOD: 1-18-12		<p>ROBERT H. CHADWICK, BUDDY L. CHADWICK, RANDEE C. CHADWICK, and BRUCE L. CHADWICK, children of decedent, are Petitioners.</p> <p>40 days since DOD</p> <p>No other proceedings</p> <p>I&A: \$101,000 (real property and vehicle)</p> <p>Decedent died intestate</p> <p>Petitioners request Court determination that certain real and personal property passes to them in ¼ interests each pursuant to intestate succession.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
	Aff.Sub.Wit.		
✓	Verified		
✓	Inventory		
	PTC		
	Not.Cred.		
N/A	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		<p>Reviewed by: skc</p> <p>Reviewed on: 11-12-13</p> <p>Updates:</p> <p>Recommendation: SUBMITTED</p> <p>File 10 - Chadwick</p>	

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

DOD: 6-23-12	PATRICIA D. PEREZ , Daughter, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	40 days since DOD	
	No other proceedings	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	I&A: \$80,000.00 (a 50% interest in certain real property)	
<input checked="" type="checkbox"/> Inventory		
<input type="checkbox"/> PTC	Decedent died intestate	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Petitioner requests Court determination that decedent's 50% interest in certain real property passes to her pursuant to intestate succession.	
<input checked="" type="checkbox"/> Aff.Mail	w	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: skc
		Reviewed on: 11-12-13
		Updates:
		Recommendation: SUBMITTED
		File 11 – Perez

	ADRIANNE MOUTON , Maternal Aunt is Guardian.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Petitioner provided documentation that a guardianship petition was filed in Clark County, NV; however, it is not known whether guardianship has been granted and established there yet.</p> <p>Has the guardianship been established in Clark County, NV? What was the outcome of the hearing on 9-12-13?</p> <p><u>Note:</u> Upon proof that guardianship has been established in Clark County, NV, the Court will terminate this guardianship in Fresno.</p>
	Guardian's Petition to Fix Residence Outside the State of California was granted on 7-18-13.	
	The Court set this Status Hearing Re: Establishment of Guardianship in Nevada.	
	On 9-17-13, Petitioner filed a declaration with an attached copy of a petition for guardianship filed 8-12-13 in Clark County, Nevada. The document indicates a court date of 9-12-13.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 11-13-13
		Updates:
		Recommendation:
		File 12A – Collins

13 Lina Lynn Longboy and Elisa Monique Garcia (GUARD/P) Case No. 11CEPR00786
Atty Tello, Nellie Rodriguez (Pro Per – Non-Relative – Petitioner)
 Petition for Appointment of Guardian of the Person (Prob. C. 1510)

	NO TEMP REQUESTED	NEEDS/PROBLEMS/COMMENTS:
	NELLIE RODRIGUEZ TELLO , Non-Relative, is Petitioner.	Note: This petition pertains to Elisa only. Maternal Grandmother Josephina Gonzalez was appointed guardian of Elisa's sister Lina on 3-14-12. Ms. Gonzalez filed a petition for guardianship of Elisa; however, per minute order 9-16-13 that petition was withdrawn in favor of Ms. Tello filing this petition since she lives there.
	Father: ROQUE M. GARCIA	
	Mother: GRACE CAMARILLO (DUFFY)	
	Paternal Grandfather: Not listed Paternal Grandmother: Lupe Mandragon	
	Maternal Grandfather: Jess Camarillo Maternal Grandmother: Josephina Gonzalez	
<input type="checkbox"/>	Aff.Sub.Wit.	
<input checked="" type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	X
<input type="checkbox"/>	Aff.Mail	X
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input type="checkbox"/>	Pers.Serv.	X
<input checked="" type="checkbox"/>	Conf. Screen	
<input checked="" type="checkbox"/>	Letters	
<input checked="" type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input checked="" type="checkbox"/>	DSS Report	
<input checked="" type="checkbox"/>	Clearances	
<input checked="" type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input checked="" type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
	Petitioner states the mother is in a program. The minor lives with Petitioner and she needs to be able to take her to school and doctor appointments. The father has given Petitioner permission to get guardianship of the minor.	<ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: <ul style="list-style-type: none"> - Elisa Monique Garcia (Minor, age 16) - Roque M. Garcia (Father) - Grace Camarillo (Mother) 3. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: <ul style="list-style-type: none"> - Paternal Grandfather - Lupe Mondragon (Paternal Grandmother) - Jess Camarillo (Maternal Grandfather) - Josephina Gonzalez (Maternal Grandmother)
	DSS Investigator Irma Ramirez filed a report on 11-7-13.	
	Assigned Court Investigator: Charlotte Bien	
		Reviewed by: skc
		Reviewed on: 11-13-13
		Updates:
		Recommendation:
		File 13 – Longboy & Garcia

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

Age: 3	TEMPORARY EXPIRES 11/19/13	NEEDS/PROBLEMS/COMMENTS:
	JEANETTE ORTEGA , maternal grandmother, is Petitioner.	Minute Order of 10/01/2013: Ms. Ortega is advised that the father will need to be personally served.
Cont. from	Father: DONNY BARNs	1. Need Notice of Hearing.
<input type="checkbox"/> Aff.Sub.Wit.	Mother: VANITY SUAREZ	2. 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:
<input checked="" type="checkbox"/> Verified	Paternal grandparents: NOT LISTED	<ul style="list-style-type: none"> • Donny Barns (Father) • Vanity Suarez (Mother)
<input type="checkbox"/> Inventory	Maternal grandfather: NOT LISTED	3. Need proof 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:
<input type="checkbox"/> PTC	Petitioner states that she was previously appointed temporary guardian, but missed the hearing for the permanent guardianship. She states that the mother is on drugs. She states the child has been residing with her off and on since birth and she is provided a stable drug-free home, she has her own room and is in a Head Start Program.	<ul style="list-style-type: none"> • Paternal Grandparents (Not Listed) • Maternal Grandfather (Not Listed)
<input type="checkbox"/> Not.Cred.		4. A Declaration of Due Diligence was filed on 09/17/2013 however it is unclear who it pertains to as the handwriting is illegible.
<input type="checkbox"/> Notice of Hrg x	Court Investigator Jo Ann Morris' report filed 11/07/2013.	
<input type="checkbox"/> Aff.Mail x		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv. x		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input 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: LV
		Reviewed on: 11/13/2013
		Updates:
		Recommendation:
		File 14 – Barns

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

		JUANITA D. RIOS, paternal grandmother, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Proof of service of Notice of Hearing on the parents indicates that they were served with Notice of Hearing only, without a copy of the petition as required by Probate Code §1511. The Court may require further service.</p>
		Father: JORGE D. RIOS - Personally served with Notice of Hearing only on 10-5-13	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	w/o	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
<p>Paternal Grandfather: Arturo G. Rios, Deceased</p> <p>Maternal Grandfather: Allen Lederman, Deceased</p> <p>Maternal Grandmother: Autumn Verdote, served by mail on 09/21/2013</p> <p>Petitioner states the father is incarcerated and the mother is unfit to have the children. There is an open CPS case for child abuse and child endangerment and neglect. The minors have lived with Petitioner since 2011 per the UCCJEA.</p> <p>Court Investigator Charlotte Bien filed a report on 11-4-13.</p>			
<p>Reviewed by: skc</p>			
<p>Reviewed on: 11-13-13</p>			
<p>Updates:</p>			
<p>Recommendation:</p>			
<p>File 15 – Lederman-Rios & Rios</p>			

16 Angelina Delgado and Kaylynn Lenard

Case No. 11CEPR00559

Atty Garcia, Rosario (Pro Per – Mother – Petitioner)
Atty Alvarez-Garcia, Maria (Pro Per – Maternal Grandmother – Guardian)
Atty Garcia, Alfredo (Pro Per – Maternal Grandfather – Guardian)
Petition for Visitation

	ROSARIO GARCIA , Mother, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	MARIA ALVAREZ-GARCIA and ALFREDO GARCIA , Maternal Grandparents, were appointed guardians on 8-30-11. - <i>Personally served 10-15-13</i>	
	Father: KEVIN LENARD	
	Petitioner states she would like to be able to see her kids three times a week or to have overnight weekend visits.	
<input type="checkbox"/>	Aff.Sub.Wit.	
<input checked="" type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input checked="" type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input checked="" type="checkbox"/>	Pers.Serv.	
<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: 11-13-13
		Updates:
		Recommendation:
		File 16 – Delgado & Lenard