



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Sixth Account and Report of Trustee and Petition for Approval Thereof, and for Allowance of Trustee's Compensation and Attorneys' Fees

		WESTAMERICA BANK , Trustee, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. It appears Petitioner paid a filing fee of \$435 for this petition and request reimbursement for same; however, the filing fee for this type of petition is \$200. Therefore, \$200 reimbursement will be authorized from the trust. 2. Need account statements pursuant to Probate Code §2620(c). See Cal. Rule of Court 7.9803. <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p>
		Account period: 1/1/13 – 12/31/14	
		Accounting: \$154,265.11	
		Beginning POH: \$127,715.28	
		Ending POH: \$ 93,196.36	
		(\$8,974.87 cash plus various mutual funds and a personal property item)	
Cont. from 110315			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
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<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	2620(c)	X	
<input type="checkbox"/>	Order	X	
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<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>The following fees and expenses were paid during this account period. Petitioner requests the court approve and confirm these payments. See Page 2 for details of each.</p> <ul style="list-style-type: none"> • Trustee: \$2,400 • IBAR: \$1,973.37 • Tax Accounting Fees: \$900.00 • Trust Accounting Fees: \$1,218.75 • Caregiver Services: \$22,261.08 • Medical: \$5,039.06 • Misc.: \$16,463.21 • Residence: \$8,371.11 <p>Attorney: \$2,500.00 (Per local rule)</p> <p>Costs: \$435.00 (filing this petition)</p> <p>Petitioner requests this Court to order that:</p> <ol style="list-style-type: none"> 1. The Sixth Account and Report of Petitioner as trustee be settled, allowed, and approved as filed; 2. All acts and proceedings of Petitioner as trustee be confirmed and approved; 3. Petitioner be authorized and directed to pay Baker Manock & Jensen PC an amount not to exceed \$2,500.00 as fees for services rendered to Petitioner through the filing of the instant petition and costs of \$435 (see #1); and 4. Such further order be made as the Court considers proper. <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p>	
		Reviewed by: skc	
		Reviewed on: 11/23/15	
		Updates:	
		Recommendation:	
		File 1 - Williams	

Page 2

Trustee: \$2,400 (Paid) Fees are paid monthly calculated at the rate of 0.75% of the market value at the end of the prior monthly divided by 12, or a minimum fee of \$100/month. Petitioner requests the Court approve and confirm these trustee fees. Since appointment, Petitioner has performed all duties required including care and custody of assets, collection of income, periodic review of assets, investments in the best interest of the trust estate, preparation and filing of fiduciary income tax returns and preparation of this report and petition and other services pertaining to the management and administration of the trust. See also Declaration of Lisa Choi filed 9/28/15.

IBAR: \$1,973.37 (Paid) \$1,973.37 has been paid during the account period. Petitioner states IBAR Settlement Company has provided case management and advisory services to the trustee and acts as a liaison between the trustee and the beneficiary and his family. Petitioner requests the Court approve the payments to IBAR made during this account period totaling \$1,937.37.

Tax Accounting Fees: \$900.00 (Paid) Petitioner paid \$450.00 to Williams & Olds, CPA, for accounting services in connection with the preparation of the 2012 fiduciary income tax returns and \$450.00 in connection with the 2013 fiduciary income tax returns, and requests the Court approve and confirm these payments totaling \$900.00.

Trust Accounting Fees: \$1,218.75 (Paid) Petitioner paid \$1,218.75 to Robert Chinskey, CPA for accounting fees in connection with the Fifth Account and requests the Court approve and confirm.

Caregiver Services: \$22,261.08 (Paid) Petitioner paid \$22,261.08 for caregiver services rendered to the beneficiary and payroll processing for such services. The payments were paid to Lillie F. Willis, the beneficiary's cousin, and the payroll processing payments were made to Risk Management Services (RMS). Petitioner requests the Court approve and confirm these caregiver-related payments.

Medical: \$5,039.06 (Paid) \$5,039.06 was paid for medical expenses of the beneficiary and supplies during the account period. Petitioner requests the Court approve and confirm these payments.

Misc.: \$16,463.21 (Paid) \$16,463.21 was paid for misc. expenses related to the beneficiary's entertainment, utilities, care, and special needs, including for the beneficiary's cell phone and cable service, telephone bill, PG&E bill, City utilities, and modest amounts for the Beneficiary to make gifts to his family members. This total amounts to an average of only \$685.97 per month.

Residence: \$8,371.11 (Paid) The beneficiary and his mother co-own the real property located at 1422 W. Robinson in Fresno, where the beneficiary has resided for more than 12 years. The property has been modified to accommodate his special needs, including wheelchair access, and it is important that the beneficiary be allowed to live in his own home. To facilitate this goal, Petitioner paid \$8,371.11 for expenses relating to the property, including without limitation lawn care, plumbing services, insurance, repairs, home warranty, and property taxes. This amounts to approx. \$348.80/month. Petitioner requests the Court approve and confirm these payments.

Attorney: \$2,500.00 (Per local rule)

Costs: \$435.00 (filing this petition) (See note #1.)

Page 3 – NEEDS/PROBLEMS/COMMENTS (Cont'd):

3. Petitioner states the beneficiary co-owns the residence with his mother outside of the trust; however, it appears the trust is paying the entirety of expenses relating to the residence. Petitioner states it is important that the beneficiary continue to live at home; however, Petitioner does not indicate whether the payments made for basics such as lawn care, plumbing, insurance, utilities, etc., are shared by the occupants, or solely paid by the trust, and Petitioner also does not state how these basic living expenses qualify as "special needs."
4. Disbursements were made for gifts totaling \$500.00 as follows:
 - 6/17/13 \$50 Calvin Williams for fathers gift fbo Ulysses Williams
 - 9/9/13 \$150 Calvin Williams for birthday funds fbo Ulysses Williams
 - 6/10/14 50 Calvin Williams for fathers gift fbo Ulysses Williams
 - 8/21/14 \$150 Calvin Williams for birthday money fbo Ulysses Williams
 - 12/18/14 \$100 Calvin Williams for Christmas funds fbo Ulysses WilliamsNeed clarification, as cash gifts do not appear to be appropriate expenditures from a special needs trust.
5. Need order pursuant to Local Rule 7.1.1.F.

Failure to File a First Account or Petition for Final Distribution

DOD: 02/10/92	DANECE HANNAH HAMILTON , surviving spouse, was appointed Administrator of the Estate with Limited IAEA and bond of \$20,000.00 on 05/13/92. Letters were issues on 05/13/92.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 10/2815 Minute Order from 10/28/15 states: Counsel requests 30 days; no appearance is necessary on 12/02/15 of the petition is filed at least two court days prior.</p> <p>As of 11/20/15, nothing further has been filed.</p> <p>1. Need Accounting/Petition for Distribution and/or current verified status report.</p>
Cont. from 042915, 102815	Inventory & Appraisal filed 02/23/94 - \$107,198.00	
Aff.Sub.Wit.	<p>Minute Order from hearing on 06/30/10 states: the court orders Danece Hamilton removed as personal representative of the estate, proper notice having been given. The court appoints the Public Administrator forthwith. Letters are to issue from the Minute Order.</p> <p>Letters of Administration were issued to the Public Administrator on 07/27/10.</p> <p>Notice of Lien was filed 02/13/15.</p> <p>Notice of Status Hearing filed 03/09/15 set this matter for a status hearing re Failure to File First Account and Petition for Distribution.</p> <p>Status Report Regarding Estate Assets filed 10/27/15 states: The decedent's wife (and former administrator) Danece Hamilton, has been residing at the residence located in Tollhouse, CA. The property taxes had not been paid and the Public Administrator filed an Unlawful Detainer action to have her evicted so they could sell the property and pay the taxes owed. However, Ms. Hamilton made arrangements to pay the taxes, and she has stated that she would like to pay the costs of administration of the estate, so that she can keep the home. More time is necessary to work that out with her. Therefore, it is requested that the next status hearing be set no more than 30 days from the date of this hearing.</p>	
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9202		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<p>Reviewed by: JF</p> <p>Reviewed on: 11/20/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 2 - Hamilton</p>

3A Lois Elaine Frame (Estate)

Case No. 06CEPR01232

Attorney Matsumoto, Russell D. (for Ted R. Frame – Executor)

Probate Status Hearing for Failure to File a First Account or Petition for Final Distribution

DOD: 05/27/1999	TED R. FRAME , was appointed Executor with full IAEA authority without bond on 01/23/2007.	NEEDS/PROBLEMS/COMMENTS:					
	Letters issued on 01/23/2007						
Cont. from 091615	Final Inventory and Appraisal was filed on 07/12/2007 showing an estate valued at \$84,100.00.	3B is the Status Hearing for the filing of the Petition for Successor Representative.					
Aff.Sub.Wit.	First Account and/or Final Distribution was due on 03/2008.						
Verified	Notice of Status Hearing set this matter for the failure to file a First Account or Petition for Final Distribution. Notice was mailed to Russell Matsumoto and Ted R. Frame on 07/16/2015.	Minute Order of 09/16/2015: Counsel will be filing a new petition for appointment of a Successor Representative. If a new petition is filed at least two court days prior to 12/02/2015, the status hearing for the filing of said petition will go off calendar, and the status hearing for filing of the first and final account will advance to that date given to the new petition so that no appearance would be necessary on 12/02/2015.					
Inventory							
PTC	Status Hearing Declaration by Attorney for Deceased Personal Representative filed 09/03/2015 states the executor serves as executor of the Decedent's Will and personal representative of the Decedent's Estate until his death on 04/24/2015, and the administration of the estate was left incomplete, matters involving the administration of the executor's estate and related affairs are in the process of being resolved. Probate code § 8522 provides for the appointment of a successor personal representative when there are no other personal representatives, by petition and service on interested persons in the manner provided in Article 2 (commencing with Section 8110) of Chapter 2 of the Probate code. Mr. Matsumoto is informed and believes Bertha A. Frame, the spouse of Executor at the time of Executor's death, intends to file a Petition for Letters of Administration with Will Annexed, and further informed and believe that such petition is currently in the process of being prepared. Mr. Matsumoto respectfully requests this status hearing be continued for 60 days, during which time, he is informed and believes such petition for appointment of a successor personal representative would be filed.	1. Need First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.					
Not.Cred.							
Notice of Hrg		<table border="1"> <tr> <td>Reviewed by: LV</td> </tr> <tr> <td>Reviewed on: 11/23/2015</td> </tr> <tr> <td>Updates:</td> </tr> <tr> <td>Recommendation:</td> </tr> <tr> <td>File 3A - Frame</td> </tr> </table>	Reviewed by: LV	Reviewed on: 11/23/2015	Updates:	Recommendation:	File 3A - Frame
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Reviewed on: 11/23/2015							
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Citation							
FTB Notice							

3B Lois Elaine Frame (Estate) Case No. 06CEPR01232

Attorney Matsumoto, Russell D. (for Ted R. Frame – Executor)

Probate Status Hearing RE: Filing of Petition for Successor Representative

DOD: 05/27/1999	TED R. FRAME , was appointed Executor with full IAEA authority without bond on 01/23/2007.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Petition for Successor Representative.</p>
	Letters issued on 01/23/2007	
Cont. from	Minute Order of 09/16/2015 set this Status Hearing for the filing of the Petition for Successor Representative.	
Aff.Sub.Wit.	Minute Order of 09/16/2015: Counsel will be filing a new petition for appointment of a Successor Representative. If a new petition is filed at least two court days prior to 12/02/2015, the status hearing for the filing of said petition will go off calendar, and the status hearing for filing of the first and final account will advance to that date given to the new petition so that no appearance would be necessary on 12/02/2015.	
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		Reviewed by: LV
		Reviewed on: 11/23/2015
		Updates:
		Recommendation:
		File 3B

3B

Third Account Current and Report of Trustee; Petition for Allowance of Compensation to Trustee and Attorney

		PUBLIC GUARDIAN , Trustee, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Proof of service of the Notice of Hearing filed 10/15/15 indicates that the whereabouts of John J. Rossi are unknown. It is unclear who John J. Rossi is (the beneficiary?). Need clarification and Proof of Service or declaration of due diligence for Michael John Rossi.</p> <p>Note: If the petition is granted, a status hearing will be set as follows:</p> <ul style="list-style-type: none"> Wednesday, December 7, 2016, at 9:00am in Dept. 303 for filing of the Fourth Account. <p>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.</p>
		Account period: 08/06/14 – 10/05/15	
Cont. from		Accounting: \$170,940.40	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH: \$170,849.23	
<input checked="" type="checkbox"/>	Verified	Ending POH: \$168,773.90	
<input type="checkbox"/>	Inventory	Trustee: \$95.20 (1 staff hour @ \$76/hr. and .20 Deputy hours @ \$96/hr.)	
<input type="checkbox"/>	PTC	Attorney: \$600.00 (less than allowed per Local Rule)	
<input type="checkbox"/>	Not.Cred.	Bond Fee: \$421.94 (ok)	
<input checked="" type="checkbox"/>	Notice of Hrg	Petitioner prays for an Order:	
<input checked="" type="checkbox"/>	Aff.Mail w/o	1. Approving, allowing and settling the third account;	
<input type="checkbox"/>	Aff.Pub.	2. Authorizing the trustee and attorney fees and commissions;	
<input type="checkbox"/>	Sp.Ntc.	3. Authorizing payment of the bond fees.	
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
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<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
Reviewed by: JF			
Reviewed on: 11/23/15			
Updates:			
Recommendation:			
File 4 – Rossi			

Attorney Jeffrey B. Pape (for Petitioner Hellen K. Davis, Trust Beneficiary)
 Attorney Matthew C. Wagner (for Respondent Patricia Vaughn, Successor Trustee)

Petition to Instruct Trustee to Terminate Trust, Distribute Assets, Perform Terms of Settlement Agreement, Objection to Accounts, and Request for Surcharge and Other Remedies

DOD: 1/23/2011	HELLEN K. DAVIS , Beneficiary, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Petitioner states:	
	<ul style="list-style-type: none"> Since Decedent's death, PATRICIA A. VAUGHN has been and currently is the Trustee of the ROSALEE O. WHEELER TRUST executed on 2/13/2009 (copy of trust attached as Exhibit A); On 4/11/2013, the parties reached a settlement of their dispute with assistance of the Court, regarding the disposition of trust assets (copy of Settlement Agreement attached as Exhibit B); Under Probate Code § 15407, a trust terminates when the trust term expires or the trust purpose is fulfilled; There have been a number of difficulties related to completing the distribution of the Trust property arising from the disposition, management, and costs of joint ownership of non-trust real property; Decedent, Patricia A. Vaughn, and Hellen Davis owned real property located in Quartzite, Arizona as joint tenants; upon Decedent's demise, the property has thereafter been owned by Patricia Vaughn and Petitioner, Hellen Davis; While the Petitioner has repeatedly expressed to her co-owner the desire to sell or partition the real property due to disputes over management and control, as well as costs attendant to ownership, Patricia Vaughn has used trust assets or her personal assets to pay Petitioner's costs of the jointly owned real property and charged such payments to Petitioner as a distribution without Petitioner's consent, thereby preserving and protecting Trustee's personal interest in the joint real property and acting for her own personal benefit; Trustee has been self-dealing in violation of her fiduciary duties; The Trustee was required to make distributions to Petitioner directly rather than pay Petitioner's alleged costs related to the non-trust real property; 	<ol style="list-style-type: none"> Need proposed order pursuant to Local Rule 7.1.1(F) which provides a proposed order shall be submitted with all pleadings that request relief.
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
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<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order	X	
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
	~Please see additional page~	
		Reviewed by: LEG
		Reviewed on: 11/20/15
		Updates:
		Recommendation:
		File 5 - Wheeler

Petitioner states, continued:

- As of the date of this Petition, 10/21/2015, certain trust assets have not been distributed, including but not limited to the following *[please refer to Pages 2 to 6 for list of assets not distributed and Petitioner's assertions regarding completion of settlement terms]*;
- Excessive Trustee Fees and Costs: The Trustee is entitled to reasonable attorneys' fees; however, the Trustee has charged this Trust over **\$36,323.10** in fees and costs related to the administration of the trust over 4 years;
- While Petitioner has waived any claims against Trustee for the first two accounting periods in consideration of the settlement agreement, Petitioner has not and does not for the last two periods;
- There is no justification for charging trustee fees of **\$30,000.00+** for the last 2-year period; a large portion of the Trustee fees for the last two periods relate to multiple trips to Arizona to the jointly owned property to dispose of the Trust's personal property; given the size of this Trust estate, these fees are not justified;
- In addition, accountings reveal the Trustee spent over **\$5,000.00** to copy the Decedent's diaries; Petitioner believes the Trustee had the diaries scanned and could have been provided in electronic format for the cost of a disc; Trustee's two most recent accountings are attached as Exhibit E and F, evidencing a portion of these payments.

Petitioner requests that:

1. Patricia Vaughn be instructed to terminate the trust, distribute the remaining trust assets, and complete the trust administration immediately;
2. Patricia Vaughn be instructed to distribute to Petitioner all sums withheld by Patricia Vaughn for claimed offsets according to proof;
3. The Court disallow the Trustee her fees and costs and require her to reimburse the trust in a reasonable amount; and
4. The Court order such attorney fees and costs as may be allowable by law.

Attorney **Dean Hiyama (for Carol Smiley, Conservator)**

Status Hearing re: Filing of the Annual or Biennial Account

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>OFF CALENDAR</p> <p>Second Account and Report of Conservator filed on 11/20/2015 is set for hearing on 1/25/2016</p>
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
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<input type="checkbox"/>	Citation	
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		Reviewed by: LEG
		Reviewed on: 11/23/15
		Updates:
		Recommendation:
		File 6 – Williams

Third Account Current and Report of Trustee; Petition for Allowance of Compensation to Trustee and Attorney

		PUBLIC GUARDIAN , Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 08/13/14 – 10/05/15	Note: A Status hearing will be set for
		Accounting: \$34,341.20	<ul style="list-style-type: none"> Wednesday, December 7, 2016, at 9:00am in Dept. 303 for filing of the Fourth Account. <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>
		Beginning POH: \$34,340.71	
		Ending POH: \$33,332.60	
		Trustee: \$115.36 (1 staff hour at \$76/hr. and .41 Deputy hours @ \$96/hr.)	
		Attorney: \$450.00 (less than allowed per Local Rule)	
		Petitioner prays for an Order:	
		1. Approving, allowing and settling the Third Account; and	
		2. Authorizing the Trustee and attorney fees and compensation.	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
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<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: JF
			Reviewed on: 11/23/15
			Updates:
			Recommendation:
			File 7 – Soto

Attorney Richard Hemb (for former Administrator, Michelle Curley)
 Attorney Heather Kruthers (for Public Administrator, Court-appointed Successor Administrator)

Probate Status Hearing re: Failure to File a Petition for Final Distribution

DOD: 9/7/2012	MICHELLE R. CURLEY , daughter, was appointed Administrator with Full IAEA authority with \$30,000.00 bond on 11/7/2012.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need petition for final distribution, or verified status report pursuant to Probate Code § 12200.</p> <p>Notes:</p> <ul style="list-style-type: none"> • Court records do not show an order prepared by Attorney Hemb and approved by Attorney Kruthers as to form and content has been filed with the Court, as ordered to Mr. Hemb by <i>Minute Order</i> dated 2/26/2016. • <i>Notice of Non-Payment of Bond Premium</i> was filed by U.S. Specialty Insurance Co. on 9/24/2015, stating that as a result of the non-payment of bond premiums due, they object to the final discharge of Michele Curley until such time as the premiums have been paid in full.
Cont. from	Proof of Bond was filed 1/22/2013 and 1/14/2014 , totaling \$44,000.00 . <i>Letters</i> issued on 1/22/2013.	
Aff.Sub.Wit.		
Verified		
Inventory	Pursuant to Probate Code § 8800(b) , <i>Final Inventory and Appraisal</i> was filed 10/15/2015 showing an estate value of \$110,367.38 .	
PTC		
Not.Cred.		
Notice of Hrg	Minute Order dated 9/2/2014 [Judge Oliver] from the status hearing re filing of the First Account states the Court removes Ms. Curley as Administrator and appoints the PUBLIC ADMINISTRATOR . Ms. Curley needs to file accounting. Counsel is to notify the bond company of the status.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Minute Order dated 2/26/2015 from the hearing on the <i>First and Final Account</i> filed 2/21/2015 by former Administrator Michelle Curley states the Court does not find that the estate is in a condition to be closed. Mr. Hemb is to submit an order that has been approved by Ms. Kruthers as to form and content.	
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202 Order	Notice of Status Hearing filed 9/25/2015 set this status hearing on 12/2/2015 for failure to file the petition for final distribution.	
Aff. Posting		
Status Rpt		
UCCJEA	Clerk's Certificate of Mailing shows the notice was mailed to Attorney Kruthers on 9/25/2015.	
Citation		
FTB Notice		
		Reviewed by: LEG
		Reviewed on: 11/23/15
		Updates:
		Recommendation:
		File 8 - Martinez

Atty Getty-Hopkins, Karen (pro per Guardian/maternal grandmother)

Atty Hopkins, Edwin K. (pro per Guardian/maternal grandfather)

Probate Status Hearing RE: Final Account Bank Statements and Consideration of Termination of the Guardianship

	KAREN GETTY HOPKINS , maternal grandmother, and EDWIN K. HOPKINS , maternal grandfather, were appointed co-guardians of the person and estate on 12/3/13. All funds were ordered placed into a blocked account.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>As of 11/23/15, nothing further has been filed in this matter.</p> <p>Note: The minor turned 18 on 10/14/15. The Final Account and Report of Guardian and Petition for Distribution is now due (if required by the Court).</p>
Cont. from	Letters issued on 12/4/13.	
Aff.Sub.Wit.	Receipt for Blocked Account filed on 2/5/14.	
Verified	Inventory and appraisal filed on 3/27/14 showing an estate valued at \$20,789.58.	
Inventory	Declaration filed 3/13/15 includes bank statement showing a balance of \$20,791.31 in a blocked account.	
PTC	Minute order from Status Hearing on 04/07/15 set this status hearing and states: The Court accepts the bank statements and waives the requirement of a formal accounting for the next year.	
Not.Cred.	Declaration of Former Minor Regarding Final Accounting of Guardianship Estate filed 11/23/15 states: He turned 18 on 10/14/15. He and the guardians wish to have the blocked account at Wells Fargo Bank unblocked and disbursed to another savings account in his name. He does not wish to have his grandparents/guardians provide an accounting of the blocked account. Attached is a copy of the most recent bank statement for the blocked account. He accepts this as a final accounting.	
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 11/23/15
		Updates:
		Recommendation:
		File 9 - Ellis

Probate Status Hearing Re: Filing Inventory and Appraisal

	BRUCE BICKEL was appointed as Conservator of the Estate on 6/18/15 with bond of \$130,000.00.	NEEDS/PROBLEMS/COMMENTS: 1. Need Final Inventory and Appraisal or written status report per Local Rule 7.5.
	Bond was filed 8/5/15 and Letters issued 9/3/15.	
Cont. from 102815		
Aff.Sub.Wit.		
Verified	At the hearing on 6/18/15, the Court set this status hearing for the filing of the Inventory and Appraisal.	
Inventory		
PTC		
Not.Cred.	Status Report filed 10/26/15 by Attorney Bagdasarian, for Conservator of the Estate Bruce Bickel, states the I&A has been submitted to Probate Referee Steven Diebert and they are awaiting the completion of same for filing. A continuance of 30 days is requested.	
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	I&A Partial No. 1 was filed 11/18/15.	
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 11/20/15
		Updates:
		Recommendation:
		File 10 – Snavelly

11A Jose Manuel Camacho (Estate) Case No. 14CEPR00177

Attorney Markeson, Thomas A. (for Eustolia Camacho – Administrator)

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

DOD: 11/25/2012	<p>EUSTOLIA CAMACHO, surviving spouse, was appointed Administrator with full IAEA authority without bond on 04/28/2014.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
	<p>Letters issued on 04/29/2014</p>	<p>11B through 11K are Petitions for Appointment of Guardian Ad Litem.</p>
Cont. from 060515, 102815	<p>Inventory and Appraisal filed 01/30/2015 shows an estate valued at \$743,000.00.</p>	<p>Minute Order of 10/28/2015: Counsel requests time to file a Petition for Instructions and obtain a ruling before filing the account.</p>
Aff.Sub.Wit.	<p>Minute Order of 04/28/2014 set this matter for hearing for the filing of the First Account.</p>	<p>1. Need First Account or Petition for Final Distribution.</p>
Verified	<p>Status Statement on Filing Petition for Distribution filed by Attorney Thomas A. Markeson on 10/22/2015 states the petition for distribution is not ready to be filed. The estate's 50% interest in the El Mexicano restaurant in Fowler has been inventoried and appraised. The supplemental inventory was filed with the court on August 31st.</p>	
Inventory	<p>The problem with disclaimers of the decedent's children has not yet been resolved. The intent of the disclaimers (filed with the court on March 17th) was to pass the property to the surviving spouse. However, pursuant to Probate Code §282 the actual effect was to pass the interest to the respective children of the disclaimants'. Eleven of those respective individuals (grandchildren of the decedent) are minors. Fresno Attorney David Knudson has been appointed Guardian ad Litem for one of the eleven. Petitions to have him appointed for the remaining 10 minors were filed on October 21st. Assuming he is appointed, he will then evaluate the propriety of executing an assignment of the interest to the surviving spouse. Assuming he believes an assignment is appropriate, the intent is to have him execute assignments on behalf of the minor children and to include those assignments as an attachment to a petition (1) to distribute the estate and (2) to approve the assignments. The assignments for the four grandchildren who are adults will be filed prior to hearing on the petition for distribution. Assignments will also be obtained from each of the seven children of the decedent to the surviving spouse. The assignments for the four children and seven children have been forwarded for signature by the respective individuals.</p>	<p>Reviewed by: LV</p>
PTC	<p>Accordingly, Mr. Markeson is requesting the court continue this hearing for 30 days in order to obtain assignments from affected individuals and to complete the petition for distribution.</p>	<p>Reviewed on: 11/23/2015</p>
Not.Cred.		<p>Updates:</p>
Notice of Hrg		<p>Recommendation:</p>
Aff.Mail		<p>File 11A - Camacho</p>
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		

11C Jose Manuel Camacho (Estate) Case No. 14CEPR00177

Attorney Markeson, Thomas A. (for Eustolia Camacho – Petitioner)

Ex Parte Petition for Appointment of Guardian Ad Litem Re: Alyssa Salazar

		EUSTOLIA CAMACHO , petitioner, was appointed Administrator of the Estate of Jose Manuel Camacho on 04/29/2014. Letters issued on 04/29/2014.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>3. Need Notice of Hearing.</p> <p>4. Need proof of service of the notice of hearing, with a copy of the petition on all interested parties no later than 15 days prior to the hearing.</p>
Cont. from		Petitioner requests: Attorney David Knudson be appointed as Guardian ad Litem for minor, Alyssa Salazar .	
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory		Petition states: Jobita Salazar is the daughter of the decedent. Counsel for personal representative spoke to Ms. Salazar in 2015 and determined that she wanted her interest in the decedent's estate to pass to the decedent's surviving spouse, Eustolia Camacho.	
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Aff.Mail	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.		Counsel for the personal representative prepared a disclaimer but inadvertently failed to include language that the disclaimer was binding on her heirs and assigns. As a result, the disclaimed interest passed as if only Jobita Salazar predeceased her father. That was not her intent at the time she executed the disclaimer.	
<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		Appointment of David Knudson as Guardian Ad Litem for the minor child is sought for the purpose of evaluating whether to assign the ward's interest in the estate to Eustolia Camacho and to execute an assignment if appropriate.	
<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: LV
			Reviewed on: 11/23/2015
			Updates:
			Recommendation:
			File 11C - Camacho

11C

11D Jose Manuel Camacho (Estate) Case No. 14CEPR00177

Attorney Markeson, Thomas A. (for Eustolia Camacho – Petitioner)

Ex Parte Petition for Appointment of Guardian Ad Litem Re: Brenda Zepeda

		EUSTOLIA CAMACHO , petitioner, was appointed Administrator of the Estate of Jose Manuel Camacho on 04/29/2014. Letters issued on 04/29/2014.	NEEDS/PROBLEMS/COMMENTS: 5. Need Notice of Hearing. 6. Need proof of service of the notice of hearing, with a copy of the petition on all interested parties no later than 15 days prior to the hearing.
Cont. from		Petitioner requests: Attorney David Knudson be appointed as Guardian ad Litem for minor, Brenda Zepeda .	
<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	Petition states: Anna Zepeda is the daughter of the decedent. Counsel for personal representative spoke to Ms. Zepeda in 2015 and determined that she wanted her interest in the decedent's estate to pass to the decedent's surviving spouse, Eustolia Camacho.	
<input type="checkbox"/> Aff.Mail	x		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.		Counsel for the personal representative prepared a disclaimer but inadvertently failed to include language that the disclaimer was binding on her heirs and assigns. As a result, the disclaimed interest passed is if only Anna Zepeda predeceased her father. That was not her intent at the time she executed the disclaimer.	
<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		Appointment of David Knudson as Guardian Ad Litem for the minor child is sought for the purpose of evaluating whether to assign the ward's interest in the estate to Eustolia Camacho and to execute an assignment if appropriate.	
<input type="checkbox"/> Aff. Posting			Reviewed by: LV
<input type="checkbox"/> Status Rpt			Reviewed on: 11/23/2015
<input type="checkbox"/> UCCJEA			Updates:
<input type="checkbox"/> Citation			Recommendation:
<input type="checkbox"/> FTB Notice			File 11D - Camacho

11E Jose Manuel Camacho (Estate) Case No. 14CEPR00177

Attorney Markeson, Thomas A. (for Eustolia Camacho – Petitioner)

Ex Parte Petition for Appointment of Guardian Ad Litem Re: Dani Zepeda

		EUSTOLIA CAMACHO , petitioner, was appointed Administrator of the Estate of Jose Manuel Camacho on 04/29/2014. Letters issued on 04/29/2014.	NEEDS/PROBLEMS/COMMENTS:
			7. Need Notice of Hearing.
			8. Need proof of service of the notice of hearing, with a copy of the petition on all interested parties no later than 15 days prior to the hearing.
	Cont. from	Petitioner requests: Attorney David Knudson be appointed as Guardian ad Litem for minor, Dani Zepeda .	
	<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	<input checked="" type="checkbox"/>	
	<input type="checkbox"/> Aff.Mail	<input checked="" type="checkbox"/>	
	<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	Appointment of David Knudson as Guardian Ad Litem for the minor child is sought for the purpose of evaluating whether to assign the ward's interest in the estate to Eustolia Camacho and to execute an assignment if appropriate.	
	<input type="checkbox"/> Aff. Posting		
	<input type="checkbox"/> Status Rpt		
	<input type="checkbox"/> UCCJEA		
	<input type="checkbox"/> Citation		
	<input type="checkbox"/> FTB Notice		
			Reviewed by: LV
			Reviewed on: 11/23/2015
			Updates:
			Recommendation:
			File 11E

11F Jose Manuel Camacho (Estate) Case No. 14CEPR00177

Attorney Markeson, Thomas A. ((for Eustolia Camacho – Petitioner)

Ex Parte Petition for Appointment of Guardian Ad Litem Re: Dante Camacho

		EUSTOLIA CAMACHO , petitioner, was appointed Administrator of the Estate of Jose Manuel Camacho on 04/29/2014. Letters issued on 04/29/2014.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>9. Need Notice of Hearing.</p> <p>10. Need proof of service of the notice of hearing, with a copy of the petition on all interested parties no later than 15 days prior to the hearing.</p>
Cont. from		Petitioner requests: Attorney David Knudson be appointed as Guardian ad Litem for minor, Dante Camacho .	
<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	Petition states: Jose Manuel Camacho is the son of the decedent. Counsel for personal representative spoke to Mr. Camacho in 2015 and determined that he wanted his interest in the decedent's estate to pass to the decedent's surviving spouse, Eustolia Camacho.	
<input type="checkbox"/> Aff.Mail	x		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.		Counsel for the personal representative prepared a disclaimer but inadvertently failed to include language that the disclaimer was binding on his heirs and assigns. As a result, the disclaimed interest passed as if only Jose Manuel Camacho predeceased his father. That was not his intent at the time he executed the disclaimer.	
<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		Appointment of David Knudson as Guardian Ad Litem for the minor child is sought for the purpose of evaluating whether to assign the ward's interest in the estate to Eustolia Camacho and to execute an assignment if appropriate.	
<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: LV
			Reviewed on: 11/23/2015
			Updates:
			Recommendation:
			File 11F - Camacho

11G Jose Manuel Camacho (Estate) Case No. 14CEPR00177

Attorney Markeson, Thomas A. (for Eustolia Camacho – Petitioner)

Ex Parte Petition for Appointment of Guardian Ad Litem Re: Jennifer Osuna

		EUSTOLIA CAMACHO , petitioner, was appointed Administrator of the Estate of Jose Manuel Camacho on 04/29/2014. Letters issued on 04/29/2014.	NEEDS/PROBLEMS/COMMENTS: 11. Need Notice of Hearing. 12. Need proof of service of the notice of hearing, with a copy of the petition on all interested parties no later than 15 days prior to the hearing.
Cont. from		Petitioner requests: Attorney David Knudson be appointed as Guardian ad Litem for minor, Jennifer Osuna .	
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory		Petition states: Yolanda Osuna is the daughter of the decedent. Counsel for personal representative spoke to Ms. Osuna in 2015 and determined that she wanted her interest in the decedent's estate to pass to the decedent's surviving spouse, Eustolia Camacho.	
<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.		Counsel for the personal representative prepared a disclaimer but inadvertently failed to include language that the disclaimer was binding on her heirs and assigns. As a result, the disclaimed interest passed is if only Yolanda Osuna predeceased her father. That was not her intent at the time she executed the disclaimer.	
<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		Appointment of David Knudson as Guardian Ad Litem for the minor child is sought for the purpose of evaluating whether to assign the ward's interest in the estate to Eustolia Camacho and to execute an assignment if appropriate.	
<input type="checkbox"/> Aff. Posting			Reviewed by: LV
<input type="checkbox"/> Status Rpt			Reviewed on: 11/23/2015
<input type="checkbox"/> UCCJEA			Updates:
<input type="checkbox"/> Citation			Recommendation:
<input type="checkbox"/> FTB Notice			File 11G - Camacho

11G

11H Jose Manuel Camacho (Estate) Case No. 14CEPR00177

Attorney Markeson, Thomas A. (for Eustolia Camacho – Petitioner)

Ex Parte Petition for Appointment of Guardian Ad Litem Re: Matthew Osuna

		EUSTOLIA CAMACHO , petitioner, was appointed Administrator of the Estate of Jose Manuel Camacho on 04/29/2014. Letters issued on 04/29/2014.	NEEDS/PROBLEMS/COMMENTS: 13. Need Notice of Hearing. 14. Need proof of service of the notice of hearing, with a copy of the petition on all interested parties no later than 15 days prior to the hearing.
Cont. from		Petitioner requests: Attorney David Knudson be appointed as Guardian ad Litem for minor, Matthew Osuna .	
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory		Petition states: Yolanda Osuna is the daughter of the decedent. Counsel for personal representative spoke to Ms. Osuna in 2015 and determined that she wanted her interest in the decedent's estate to pass to the decedent's surviving spouse, Eustolia Camacho.	
<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.		Counsel for the personal representative prepared a disclaimer but inadvertently failed to include language that the disclaimer was binding on her heirs and assigns. As a result, the disclaimed interest passed is if only Yolanda Osuna predeceased her father. That was not her intent at the time she executed the disclaimer.	
<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		Appointment of David Knudson as Guardian Ad Litem for the minor child is sought for the purpose of evaluating whether to assign the ward's interest in the estate to Eustolia Camacho and to execute an assignment if appropriate.	
<input type="checkbox"/> Aff. Posting			Reviewed by: LV
<input type="checkbox"/> Status Rpt			Reviewed on: 11/23/2015
<input type="checkbox"/> UCCJEA			Updates:
<input type="checkbox"/> Citation			Recommendation:
<input type="checkbox"/> FTB Notice			File 11H

11H

111 Jose Manuel Camacho (Estate) Case No. 14CEPR00177

Attorney Markeson, Thomas A. (for Eustolia Camacho – Petitioner)

Ex Parte Petition for Appointment of Guardian Ad Litem Re: Noah Santiago

		EUSTOLIA CAMACHO , petitioner, was appointed Administrator of the Estate of Jose Manuel Camacho on 04/29/2014. Letters issued on 04/29/2014.	NEEDS/PROBLEMS/COMMENTS: 15. Need Notice of Hearing. 16. Need proof of service of the notice of hearing, with a copy of the petition on all interested parties no later than 15 days prior to the hearing.
Cont. from		Petitioner requests: Attorney David Knudson be appointed as Guardian ad Litem for minor, Noah Santiago .	
<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	Petition states: Lorraine Camacho is the daughter of the decedent. Counsel for personal representative spoke to Ms. Camacho in 2015 and determined that she wanted her interest in the decedent's estate to pass to the decedent's surviving spouse, Eustolia Camacho.	
<input type="checkbox"/> Aff.Mail	x		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.		Counsel for the personal representative prepared a disclaimer but inadvertently failed to include language that the disclaimer was binding on her heirs and assigns. As a result, the disclaimed interest passed is if only Lorraine Camacho predeceased her father. That was not her intent at the time she executed the disclaimer.	
<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		Appointment of David Knudson as Guardian Ad Litem for the minor child is sought for the purpose of evaluating whether to assign the ward's interest in the estate to Eustolia Camacho and to execute an assignment if appropriate.	
<input type="checkbox"/> Aff. Posting			Reviewed by: LV
<input type="checkbox"/> Status Rpt			Reviewed on: 11/23/2015
<input type="checkbox"/> UCCJEA			Updates:
<input type="checkbox"/> Citation			Recommendation:
<input type="checkbox"/> FTB Notice			File 111 - Camacho

Probate Statue Hearing for filing first account and/or petition for final distribution.

DOD: 03/19/14	HENRY BARIGIAN , brother, was appointed Executor with full IAEA and without bond on 10/15/14. Letters Testamentary were issued on 10/16/14.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need First/Final Account and Petition for Final Distribution and/or current status report.</p>
Cont. from	Inventory & Appraisal, Final filed 06/25/15 - \$45,000.00	
Aff.Sub.Wit.		
Verified		
Inventory	Minute Order from 10/15/14 set this status hearing regarding filing of the First/Final Account and Petition for Distribution.	
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 11/23/15
		Updates:
		Recommendation:
		File 13 - Barigian

Probate Status Hearing re First Account

	PUBLIC GUARDIAN , was appointed Conservator of the Person and Estate on 10/15/14. Letters of Conservatorship were issued on 10/16/14.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need First Account and/or current status report.</p>
Cont. from	Final Appraisal of Estate by Public Guardian filed 01/13/15 valued the estate at \$863.57.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Minute Order from hearing on 10/15/14 set this status hearing regarding filing of the First Account.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 11/23/15
		Updates:
		Recommendation:
		File 14 - Badiali

Attorney Curtis Rindlisbacher (for Brittney Pinson, granddaughter)

Petition to Determine Succession to Real Property

DOD: 12/1/2006		<p>BRITTANY PINSON, granddaughter, is Petitioner.</p> <p>40 days since DOD.</p> <p>No other proceedings.</p> <p>I & A - \$65,000.00</p> <p>Will dated 2/24/1992 devises the entire estate to Decedent's daughter, RUBY GIBBS PINSON.</p> <p>Petitioner requests Court determination that Decedent's 100% interest in real property located at 2489 S. Holly, Fresno, passes to the Petitioner pursuant to Decedent's Will.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Page 18 is the related case of the <i>Petition to Determine Succession</i> in the Estate of <i>Ruby Gibbs Pinson</i> (deceased daughter of Decedent Louise Gibbs.)</p> <p>Continued from 9/23/2015. Minute Order states counsel requests 45 days to evaluate how to proceed.</p> <p>The following issues from the last hearing remain:</p> <ol style="list-style-type: none"> 1. Need the original Will of the Decedent LOUISE GIBBS to be deposited with the Court pursuant to Probate Code § 8200. Deposit fee of \$50.00 will be due from Petitioner prior to any order for distribution being processed for Petitioner. 2. <i>Supplemental Declaration</i> filed 3/11/2015 states Petitioner is the granddaughter of Decedent and the representative of the Estate of RUBY GIBBS PINSON. However, Petitioner does not provide a copy of <i>Letters Testamentary</i> demonstrating that she is in fact the personal representative of the Estate of Ruby Gibbs Pinson, and Court records do not show such an estate is pending. <p align="center">~Please see additional page~</p>	
Cont. from 121014, 031115, 042215, 060315, 080515, 092315				
<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 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: LEG				
Reviewed on: 11/23/15				
Updates:				
Recommendation:				
File 16 - Gibbs				

NEEDS/PROBLEMS/COMMENTS, continued:

3. *Supplemental Declaration* filed 3/11/2015 states that the Decedent's Will gifted all of Decedent's estate, both real and personal, to Decedent's daughter, **RUBY GIBBS PINSON** (the Petitioner's mother), and that Ruby Gibbs Pinson is now deceased [DOD 6/27/2013], and the property should succeed to the Ruby Gibbs Pinson Estate. However, Court records do not show a proceeding for the **ESTATE OF RUBY GIBBS PINSON** is pending such that distribution to the Petitioner of the assets contained in the **ESTATE OF LOUISE GIBBS** is proper. **RUBY GIBBS PINSON** is in fact named in Decedent's Will as the Decedent's daughter who is devised Decedent's entire estate. Therefore, the personal representative of the **ESTATE OF RUBY GIBBS PINSON** must petition to receive the Decedent's property, which would then be distributed to the heirs of **RUBY GIBBS PINSON**.
4. Need revised proposed order.

DOD: 12/28/2014	<p>DEBORAH A. HARPER, was appointed Administrator with Full IAEA with bond of \$185,000.00 on 5/13/15.</p>	NEEDS/PROBLEMS/COMMENTS:
Cont. from 101415	<p>An Amended Order Appointing Deborah A. Harper as Administrator with Limited IAEA authority, without bond and any estate proceeds to be placed in a blocked account, was filed on 09/24/2015.</p>	<p>Minute Order of 10/14/2015: The court vacates 10/21/2015 hearing. Status Report re: bond is due by 10/28/2015. Probate Status Hearing re: filing of the Inventory and Appraisal and if bond is necessary is set on 12/02/2015.</p>
Aff.Sub.Wit.	<p>Letters of Administration were issued on 09/28/2015.</p>	<p>1. Need Inventory and Appraisal.</p>
Verified	<p>Minute Order of 05/13/2015 set the Status Hearing for the filing of the Inventory and Appraisal.</p>	<p>Reviewed by: LV</p>
Inventory	<p>Declaration of Petitioner, Deborah A. Harper Re: Bond filed 10/28/2015 states this declaration is provided pursuant to this Court's 10/14/2015 Order that a status report concerning the nature of any cash assets discovered in the estate. Ms. Harper states that her and the decedent were not living together at the time of his death. They were in the process of divorce and had been estranged for some time prior to his unexpected passing. Ms. Harper states that no resolution, judgement or stipulation concerning their divorce had been signed or filed.</p>	<p>Reviewed on: 11/23/2015</p>
PTC	<p>On 10/13/2015, Ms. Harper traveled to the decedent's home and compiled the mail that she could find in the house to ascertain whether the estate held any cash accounts. A change of address was also requested with the U.S. Postal Service so that the Decedent's mail would be routed to Ms. Harper. Two cash accounts were identified belonging to the estate.</p>	<p>Updates:</p>
Not.Cred.	<p>Please see additional page</p>	<p>Recommendation:</p>
Notice of Hrg		<p>File 17 – Harper</p>
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		

JP Morgan Chase checking showing a \$0 balance as of 07/22/2015; and Fresno County Federal Credit Union showing a balance of \$0 as of 03/31/2015. The Fresno County Federal Credit Union account shows a number of cash withdrawals for the months preceding the decedent's death. Ms. Harper stated that she questioned the bank teller about this, and despite presenting her certified Letters of Administration, FCFCU would not provide her with information explaining who withdrew the cash sums right before the decedent's death, or who executed the affidavit regarding member's death and withdrew the remaining funds from the decedent's account. Ms. Harper is in the process of investigating this and will inform the Court when FCFCU provides clarifying information or, if they will not voluntarily do so, through subpoena.

In sum, the cash accounts that the decedent held were liquidated prior to his death, except for approximately \$3,000.00 which was withdrawn shortly after his death by an unknown person. There is no cash in the Estate that has been identified.

Ms. Harper states she has discovered a check from Nationwide Insurance Company made payable to the decedent in the amount of \$51.44, dated 04/07/2015. The check states that it is void after 90 days (which has passed). Ms. Harper will be contacting Nationwide to discuss the status of the homeowner's insurance policy on the decedent's real property and will ask that the check be reissued in light of the circumstances that the decedent passed and it took a number of months for Ms. Harper to be appointed as Administrator of the Estate. So, at this time, the only "cash" in the Estate would be the voided check in the amount of \$51.44 if Nationwide reissues the check.

Although the purpose of this declaration and status report is to inform the Court of the nature of any cash assets in the Estate, Ms. Harper states she was able to begin preparing an Inventory of personal property items at the decedent's property. From appearances, it looks as if the valuable personal property that the decedent held such as electronics, game consoles, computers, etc. have been removed. The decedent's clothes still hung in the closet and expired food was still in the refrigerator. However, it is clear that items have been removed from the home, including furniture. Ms. Harper states she is still trying to gather information regarding what was removed, when and by whom.

Attorney Curtis Rindlisbacher (for Brittney Pinson, daughter)

Petition to Determine Succession to Real Property

DOD: 06/27/13	BRITNEY PINSON , daughter, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Page 16 is the related case of the <i>Petition to Determine Succession</i> in the <i>Estate of Louise Gibbs</i>, mother of Decedent Ruby Gibbs Pinson.</p> <p>Continued from 9/23/2015. Minute Order states counsel requests 45 days to evaluate how to proceed.</p> <p>1. <i>Petition</i> must be filed by all of the following persons, who appear to succeed to the subject real property by intestate succession:</p> <ul style="list-style-type: none"> • LEANDREW GIBBS, son; • PATRICK PINSON, son; • BRITTANY PINSON (Petitioner), daughter; • DAVID POTTS, son; • SARAH JONES, daughter; • ANTHONY D. ANDERSON, son; • BOBBY BURTON, son; • RICHARD BURTON, son. <p>2. The <i>Estate of Louise Gibbs</i>, 14CEPR01008, must first properly distribute the subject real property to the <i>Estate of Ruby Pinson</i> prior to distribution of the real property to Ruby Pinson's heirs by intestate succession via the instant <i>Petition</i>.</p>
	40 days since DOD.	
	No other proceedings.	
Cont. from 060315, 080515, 102315	I & A - \$65,000.00	
<input type="checkbox"/> Aff.Sub.Wit.	Decedent died intestate.	
<input checked="" type="checkbox"/> Verified	Petitioner requests Court determination that decedent's 100% interest in real property located at 2489 S. Holly, Fresno, pass to her pursuant to intestate succession.	
<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 type="checkbox"/> Order	X	
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LEG
		Reviewed on: 11/23/15
		Updates:
		Recommendation:
		File 18 – Pinson

Probate Status Hearing RE: Transfer to Oregon

	ABEL WRATE and YER WRATE , paternal uncle and aunt, were appointed Co-Guardians on 08/26/15.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need status update regarding establishing a guardianship in the State of Oregon.</p>
	Both Petitioners and the minor reside in the State of Oregon.	
Cont. from	<p>Minute Order from 08/26/15 set this status hearing and states: The Petition is granted with the condition that the matter is to be transferred to Oregon.</p>	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed on: 11/23/15
		Updates:
		Recommendation:
		File 19 - Her

Probate Status Hearing RE: Filing of the Inventory and Appraisal

DOD: 09/30/14	<p>DON LEMLY and LINDA JENVEY, son and daughter, were appointed Co-Administrators of the Estate with full IAEA and without bond on 07/01/15. Letters of Administration were issued on 07/06/15.</p> <p>Minute Order from 07/01/15 set this status hearing regarding filing of the Inventory & Appraisal.</p> <p>Declaration of Personal Representatives Re Status of Filing Inventory and Appraisal filed 11/23/15 states: the only asset of the estate is the decedent's share of the Dusan Misita Living Trust (the "Trust"). The only asset of the Trust is real property that is currently in the process of being sold. The sale date is to be 05/27/16. Until the real property is sold by the Trust and the proceeds to which the decedent is entitled are distributed to this estate, no inventory and appraisal can be filed. It is anticipated that an Inventory & Appraisal will not be able to be filed until on or after 05/27/16.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Inventory & Appraisal.</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: JF</p> <p>Reviewed on: 11/23/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 20 - Lemley</p>	

Attorney Hubbell, Marlene A. (for Petitioner Steven L. Chavez, Trustee)
 Attorney Teresa B. Petty-Jones (for Fidela M. Moreno)

Petition Seeking Order(s) Passing on Act(s) of Attorney-in-Fact, and/or Disobeying Principal's Instruction(s), and/or Affirming Real Property Title Passing by Non-Probate Transfer

Paul Moreno DOD: 6/27/2010	STEVEN L. CHAVEZ, son and Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: Continued from 10/14/2015.
	Petitioner states:	
	<ul style="list-style-type: none"> Petitioner is the Trustee of the MORENO FAMILY GRANTOR TRUST established 7/23/2014 by Trustor FIDELA M. MORENO, widow of PAUL C. MORENO (copy of Trust attached as Exhibit A); On 9/16/2009, Fidela was appointed as Attorney-in-Fact for Paul under a Durable Power of Attorney – General (copy of POA attached as Exhibit B); This <i>Petition</i> concerns real property located on Cardinal Lane in Squaw Valley, title to ½ of which is recorded in Petitioner's name, but the chain of title has been questioned and the property cannot be sold or otherwise transferred by Petitioner without seeking appropriate orders from this Court; EDDIE LOPEZ and YOLANDA LOPEZ are co-owners of a ½ interest in the property and desire to purchase the ½ interest held by Petitioner; Petitioner seeks orders which affirm and establish title to the ½ interest in the property held by Petitioner; Petitioner also seeks orders which pass on the acts of Fidela M. Moreno as Attorney-in-Fact for her former spouse Paul C. Moreno in effecting inter vivos transfer of his joint tenancy interest in the property to herself, including approval (if necessary) to disobey the principal's instructions pursuant to Probate Code § 4234(b); 	<p>Note for background: <i>Minute Order</i> dated 8/19/2015 states in pertinent part that the Court indicates it is inclined to not grant the request. Ms. Hubbell represents that she will file an amended petition. [Court records show no amended petition has been filed as of 11/24/15.]</p> <p align="center">~Please see additional page~</p>
Cont. from 081915, 091615, 101415		
<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.	X	
<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		
	~Please see additional page~	<p>Reviewed by: LEG</p> <p>Reviewed on: 11/24/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 23 – Moreno</p>

Petitioner states, continued:

- In the alternative, if the acts of Fidela M. Moreno as Attorney-in-Fact are not approved, then Petitioner seeks orders to affirm and establish Fidela M. Moreno's ½ title interest in the property as passing by way of joint tenancy non-probate transfer to her as the surviving joint tenant;
- The written Power of Attorney appointing Fidela grants broad authority to grant, transfer or convey real property; the Power of Attorney does not contain an express grant of authority for the Attorney-in-Fact to give gifts to him or herself [language citations omitted];
- On 4/8/1981, Paul and Fidela acquired by Grant Deed an undivided ½ interest in the subject property as "husband and wife as joint tenants" (copy of Grant Deed attached as Exhibit D);
- Since 2009, the property has remained unoccupied and has not produced any income;
- On 12/3/2009, Fidela transferred by Grant Deed both her and Paul's joint tenancy interests in the property to Fidela "as her sole and separate property," executing the Grant Deed acting as the Attorney-in-Fact for Paul (copy of Grant Deed attached as Exhibit E);
- This transfer broke the joint tenancy in which the property had been held;
- The 12/3/2009 Grant Deed cannot be cancelled, rescinded or set aside in the chain of title; absent a showing of fraud, a deed cannot be set aside and any complaining party's sole remedy is an action to recover damages;
- There are no known allegations of fraud related to the 12/3/2009 Grant Deed by anyone who has or may have an interest in the portion of the property in question;
- The 12/3/2009 Grant Deed recites the transfer was "out of love and affection," which qualifies as adequate consideration, constituting "good consideration" in transfers by deed;
- Had the 12/3/2009 transfer of Paul's undivided interest in the property not taken place, the property interest would have transferred to Fidela upon Paul's death by operation of law, from deceased joint tenant to the surviving joint tenant, Fidela;
- On 12/3/2009, Fidela next transferred by Grant Deed her sole and separate interest in the property to Fidela as Trustee of the **FIDELA M. MORENO LIVING TRUST** (copy of Grant Deed attached as Exhibit F);
- On 7/23/2014, Fidela as Trustee of Fidela's Trust transferred the property to Fidela M. Moreno, a widow (copy of Grant Deed attached as Exhibit G);
- On 7/24/2014, Fidela, a widow, transferred an undivided 1/8th interest in the property to Petitioner in his capacity as Trustee of the **MORENO FAMILY GRANTOR TRUST** (copy of Grant Deed attached as Exhibit H);
- On 7/25/2014, Fidela, a widow, transferred an undivided 1/8th interest in the property to Petitioner in his capacity as Trustee of the **MORENO FAMILY GRANTOR TRUST** (copy of Grant Deed attached as Exhibit I);
- On 7/26/2014, Fidela, a widow, transferred an undivided 1/8th interest in the property to Petitioner in his capacity as Trustee of the **MORENO FAMILY GRANTOR TRUST** (copy of Grant Deed attached as Exhibit J);
- On 7/28/2014, Fidela, a widow, transferred an undivided 1/8th interest in the property to Petitioner in his capacity as Trustee of the **MORENO FAMILY GRANTOR TRUST** (copy of Grant Deed attached as Exhibit K);

~Please see additional page~

Petitioner states, continued:

- These 4 transfers of 1/8 interest each, were made for the purpose of divesting Fidela of any interest in assets or their value, which would disqualify her from receiving Medi-Cal benefits, for which she subsequently applied, received, and continues presently to receive and rely on to her benefit;
- Per Probate Code § 4231.5(b) [text omitted], since the only "liability" which could arise from the 12/3/2009 act of Fidela in her capacity as Attorney-in-Fact would be liability to herself as the joint surviving tenant, Petitioner asks the Court to find that Fidela acted reasonably and in good faith under the circumstances known only to her and excuse any "liability" she may have as an agent to herself as a surviving joint tenant;
- Petitioner asks the Court find that Fidela was not in violation of her fiduciary duties with regards to the 12/3/2009 Grant Deed, whereas Paul Moreno's interest would have nonetheless transferred to her by operation of law upon his death;
- With Court approval, the attorney-in-fact may disobey instructions of the principal (Probate Code § 4234(b); Petitioner asks the Court to approve the 12/3/2009 transfer of interest in the property to herself as an individual despite that no such express authority appears in or was given as an authorizing instruction in the Power of Attorney;
- Petitioner holds record title to a ½ interest in the property and desires to sell the property interest to co-owners, **EDDIE LOPEZ** and **YOLANDA LOPEZ**, who desire to purchase the property at a previously-appraised and mutually agreed-upon value;
- However, the title company presently holding an open escrow refuses to issue a policy of title insurance to the Lopez buyers without a Court order addressing the **12/3/2009** [emphasis added] transfer by Attorney-in-Fact Fidela Moreno, contending the transfer appears "self-interested";
- A separate proceeding was commenced on 2/3/2015 by co-owners **EDDIE LOPEZ** and **YOLANDA LOPEZ** (15CECG00356) which does not seek to quiet title to the property but only seeks judicial determination of the validity of the 12/3/2009 Grant Deed, Partition by Sale of the Subject Property, and a "determination of the interests according to the respective rights of the parties" (see Request for Judicial Notice filed 7/8/2015);
- Co-owners Eddie Lopez and Yolanda Lopez are not requesting abatement of this Petition pursuant to Probate Code § 854 and protracted litigation is unnecessary, with the Petition presenting as the most economical and expedient means of resolution of the transfer in question.

Petitioner requests an Order:

1. Passing on the acts of and affirming Fidela Moreno's 12/3/2009 transfer of Paul Moreno's interest in the property to Fidela Moreno by the power vested in her as Attorney-in-Fact for Paul Moreno, finding that Fidela Moreno acted reasonably and in good faith under the circumstances known only to her and is excused from any liability she may have as an agent;
2. Finding that Fidela Moreno was not in violation of her fiduciary duties as Attorney-in-Fact for Paul Moreno with regards to the 12/3/2009 Grant Deed executed by her as his Attorney-in-Fact;
3. Passing on the acts of and affirming Fidela Moreno's 12/3/2009 transfer of Paul Moreno's interest in the property to Fidela Moreno despite that this power was not expressly provided for in, or which was in disobedience of instructions in, the durable Power of Attorney – General executed by Paul Moreno; and
4. Affirming Fidela Moreno's title as the surviving joint tenant to the portion of the property held by Paul Moreno upon his death as a valid non-probate transfer of title.

~Please see additional page~

Dept. 303, 9:00 a.m. Wednesday, December 2, 2015

NEEDS/PROBLEMS/COMMENTS, continued:

1. Need proof of 15 days' mailed service of the *Notice of Hearing* with a copy of the *Petition* for Attorney Teresa Petty-Jones on behalf of FIDELA M. MORENO, spouse of deceased Settlor Paul Moreno, per the *Request for Special Notice* filed 10/20/2015 pursuant to Probate Code §§ 1250 and 1252.
2. Pursuant to Probate Code § 17201, *Petition* does not but should state the names and addresses of each trust beneficiary and all persons entitled to notice of the *Petition*. *Proof of Service by Mail* filed 7/8/2015 shows service was made on 7/8/2015 to 5 persons whose names should be identified in the *Petition*, and to Attorney **ROBERT C. ABRAMS**, attorney of record in Civil Case 15CECG00356.
3. *Petition* explains that the 4 transfers of 1/8 interest each in the real property were made for the purpose of divesting Fidela of any interest in assets or their value, which would disqualify her from receiving Medi-Cal benefits. The explanation for the close succession of transfers made to avoid disqualifying Fidela Moreno from Medi-Cal benefits does not provide adequate explanation for future recoupment by Medi-Cal.

Notes:

- Court records show the separate proceeding commenced on 2/3/2015 by the real property co-owners, **EDDIE LOPEZ** and **YOLANDA LOPEZ** (15CECG00356, *Eddie Lopez v. the Estate of Paul C. Moreno*), is set for an *Order to Show Cause* issued on 11/9/2015 by Judge Snauffer for Attorney **ROBERT C. ABRAMS** to appear on **1/14/2016 at 10:00 a.m. in Department 401** for failure to serve defendants within 60 days and to file an amended complaint.
- Case file contains 3 alternative proposed orders: (1) passing on the acts of Fidela Moreno as Attorney-in-Fact and affirming the transfer of title to the real property; or (2) only affirming transfer of title to Fidela Moreno as a valid non-probate transfer; or (3) denying the petition without prejudice.

Petition for Appointment of Guardian of the Person

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:
			Minute Order 10/6/15 (Temp): Leo Rockwell consents and waives any notice defect for the record; Angela Wulf objects to the petition. Written objections are to be filed and properly served by 11/18/15. The petition is granted to preserve the status quo.
			Note: As of 11/23/15, no objections have been filed.
	Aff.Sub.Wit.		<ol style="list-style-type: none"> Petitioner filed a change of address, but it states the new address is the same as the old address, and appears to provide the father's phone number instead of Petitioner's. Examiner prepared new order, letters with an address provided by the Court Investigator. Need amended change of address containing only <u>Petitioner's</u> new information. Leo Rockwell (Father) appeared at the temp hearing and consented and waived defect in notice. However, it is unclear if Mr. Rockwell was consenting and waiving notice to this general petition and hearing date as well. The Court may require personal service pursuant to Probate Code §1511. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing or consent and waiver of notice or declaration of due diligence on: <ul style="list-style-type: none"> - Paternal Grandfather - Maternal Grandfather - Maternal Grandmother Joy Astone - Siblings age 12 and older.
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report	X	
	Clearances	X	
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 11/23/15
			Updates:
			Recommendation:
			File 24 - Astone

Petitioner Dominguez, Joe (pro per – paternal grandfather/Petitioner)
 Petitioner Dominguez, Rosalinda (pro per – paternal grandmother/Petitioner)

Petition for Appointment of Guardian of the Person

		<u>NO TEMPORARY REQUESTED</u>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> <i>Declaration of Due Diligence</i> <u>or</u> <i>Consent & Waiver of Notice</i> for Joe Dominguez (brother). 2. The children's birth certificates indicate that their last name is "Day Dominguez". Petitioners list their last name as only "Dominguez" in the Petition. Need clarification. 3. Need CI report and clearances – CI to provide.
		<p>JOE DOMINGUEZ and ROSALINDA DOMINGUEZ, paternal grandparents, are Petitioners.</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/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	n/a	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report	x	
<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		
		<p>Father: JOE DOMINGUEZ, JR. – <i>currently incarcerated; Consent & Waiver of Notice filed 09/23/15</i></p> <p>Mother: DEBRA DAY – <i>Consent & Waiver of Notice filed 09/23/15</i></p> <p>Maternal grandfather: DANNY DAY – <i>deceased</i></p> <p>Maternal grandmother: CHRISTINE DAY – <i>served by mail on 09/23/15</i></p> <p>Sibling: JOE DOMINGUEZ (21)</p> <p>Petitioners state [see file for details].</p> <p>Court Investigator Jennifer Young filed a report on – NEED REPORT.</p>	
		<p>Reviewed by: JF</p>	
		<p>Reviewed on: 11/23/15</p>	
		<p>Updates:</p>	
		<p>Recommendation:</p>	
		<p>File 25 - Dominguez</p>	

Petition for Appointment of Guardian of the Person

		<u>TEMPORARY EXPIRES 12/02/15</u>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for Ted Pool (paternal grandfather).</p>
		VICKI LONG , maternal grandmother, is Petitioner.	
Cont. from		Father: DARREN LEE POOL – personally served on 10/21/15.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory	Mother: KRISTI LONG – personally served on 10/15/15.	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.	Paternal grandfather: TED POOL	
<input checked="" type="checkbox"/>	Notice of Hrg	Paternal grandmother: LINDA MARQUEZ – consents and waives notice.	
<input type="checkbox"/>	Aff.Mail	x	
<input type="checkbox"/>	Aff.Pub.	Maternal grandfather: ROBERT LONG – consents and waives notice.	
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv.	w/	
<input type="checkbox"/>	Conf. Screen	Petitioner states [see file for details].	
<input checked="" type="checkbox"/>	Letters	Court Investigator Dina Calvillo filed a report on 11/23/15.	
<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: JF	
		Reviewed on: 11/23/15	
		Updates:	
		Recommendation:	
		File 26 – Long-Pool	

Petitioner

Whitmire, Paula Jean (pro per – daughter)

Attorney

Fanucchi, Edward L. (Court appointed for conservatee)

Petition for Appointment of Temporary Conservator of the Person

Cont. from 101415		
	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
✓	Notice of Hrg	
	Aff.Mail	x
	Aff.Pub.	
	Sp.Ntc.	
✓	Pers.Serv.	w/
✓	Conf. Screen	
✓	Letters	
✓	Duties/Supp	
	Objections	
	Video Receipt	
✓	CI Report	
	9202	
✓	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	
NEEDS/PROBLEMS/COMMENTS:		
OFF CALENDAR		
Hearing vacated Per		
Minute Order dated		
11/19/15		
Reviewed by: JF		
Reviewed on: 11/20/15		
Updates:		
Recommendation:		
File 27 – Garoppo		

Petitioner Twyla Hollis (Pro Per Petitioner)
 Petitioner Montray Dernelle Ireland (Pro Per Petitioner)

Petition for Appointment of Temporary Guardian of the Person

		<u>General Hearing set for 1/27/2016</u>	NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 2. Need proof of five (5) court days' notice by personal service of the Notice of Hearing with a copy of the Petition for Appointment of Temporary Guardian, or Consent to Appointment of Guardian and Waiver of Notice, or a Declaration of Due Diligence for: <ul style="list-style-type: none"> Nathaniel Ricks, Jr., father, if Court does not excuse notice as Petitioners request. 3. Need Attachment 3 explaining answer of Petitioner Twyla Hollis to Item 3 of Confidential Guardian Screening form filed on 11/18/2015.
		TWYLA HOLLIS, maternal grandmother, and MONTRAY DERNELL IRELAND , maternal uncle, are Petitioners. ~Please see Petition for details~	
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed by: LEG	
		Reviewed on: 11/24/15	
		Updates: 11/25/15	
		Recommendation:	
		File 28 - Isaiah	

Petitioner Soto, Jasmine (pro per – maternal aunt)

Petition for Appointment of Temporary Guardian of the Person

		<u>GENERAL HEARING: 01/26/16</u>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person</i> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for: <ol style="list-style-type: none"> a. Josephine Maggard (mother) b. Israel Solorzano (Israel's father) c. David's father d. Jenessy's father
		<p>JASMINE SOTO, maternal aunt, is Petitioner.</p> <p>Mother: JOSEPHINE MAGGARD Maternal grandfather: DAVE MAGGARD Maternal grandmother: EMILY VALDEZ</p> <p>Israel: Father: ISRAEL SOLORZANO Paternal grandparents: UNKNOWN</p> <p>David & Jenessy: Father: UNKNOWN Paternal grandparents: UNKNOWN</p> <p>Petitioner states [see file for details].</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 type="checkbox"/>	Notice of Hrg	x	
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	x	
<input checked="" type="checkbox"/>	Conf. Screen		
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<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
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<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
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<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
Reviewed by: JF			
Reviewed on: 11/23/15			
Updates:			
Recommendation:			
File 29 – Solorzano/Stiles/Aguilar			

Petition for Appointment of Temporary Guardian of the Person

		<u>GENERAL HEARING: 01/26/16</u>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>3. Need <i>Notice of Hearing</i>.</p> <p>4. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:</p> <p>e. Asia Reyes (mother) f. Vincent Cruz (father) g. Andrew Cruz (minor)</p>	
		JESSICA REYES , maternal aunt, is Petitioner.		
Cont. from		Father: VINCENT CRUZ		
<input type="checkbox"/>	Aff.Sub.Wit.	Mother: ASIA REYES		
<input checked="" type="checkbox"/>	Verified	Paternal grandfather: DANIEL REYES		
<input type="checkbox"/>	Inventory	Paternal grandmother: SYLVIA REYES		
<input type="checkbox"/>	PTC	Maternal grandparents: NOT LISTED		
<input type="checkbox"/>	Not.Cred.	Siblings: ALYSSA CRUZ, ARIC CRUZ		
<input type="checkbox"/>	Notice of Hrg	Petitioner states [see file for details].		
<input type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
				Reviewed by: JF
				Reviewed on: 11/23/15
			Updates:	
			Recommendation:	
			File 30 – Cruz	

Petition for Appointment of Temporary Guardian of the Person

		<u>GENERAL HEARING: 01/27/16</u>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>5. Need <i>Notice of Hearing</i>.</p> <p>6. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person</i> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for:</p> <p>h. Gilbert Vargas (father)</p> <p>i. Arretta Brackett (mother)</p>	
		<p>AMANDA SHATTUCK and MATTHEW SHATTUCK, maternal first cousin once removed and her husband, are Petitioners.</p> <p>Father: GILBERT VARGAS</p> <p>Mother: ARRETTA BRACKETT</p> <p>Paternal grandparents: UNKNOWN</p> <p>Maternal grandfather: TOM WRIGHT</p> <p>Maternal grandmother: SHEREE BRACKETT</p> <p>Sibling: JAXSON BRACKETT</p> <p>Petitioners state [see file for details].</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 type="checkbox"/>	Notice of Hrg	x		
<input type="checkbox"/>	Aff.Mail			
<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 type="checkbox"/>	CI Report			
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<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
				<p>Reviewed by: JF</p> <p>Reviewed on: 11/23/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 31 – Vargas</p>

1B Cailyn Sky Mendoza (GUARD)

Case No. 08CEPR00223

Attorney Margojian, Michael J. (for Petitioners James Willhoit and Georgette Willhoit)
 Attorney Hopper, Cindy J. (for Samantha Willhoit, mother)
 Petitioner Mendoza, Angel (Pro Per Petitioner, paternal grandfather)
 Petitioner Garcia, Rebecca (Pro Per Petitioner, paternal grandmother)

Petition for Visitation; Notice of Motion; Supporting Declaration in Support of Petition for Visitation

		<p>SAMANTHA WILLHOIT, mother, is Petitioner.</p> <p>Petitioner seeks a formal order for visitation with the minor, based upon the following:</p> <p style="text-align: center;">~Please see Petition for details~</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>THIS MATTER WILL BE HEARD IN DEPARTMENT 72 AT 8:30 A.M.</p> <p><u>Continued from 8/26/2015.</u></p>
<p>Cont. from 082615</p>			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff. FAX		
<input type="checkbox"/>	Aff.Overnight	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	<input checked="" type="checkbox"/>	
<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: 11/25/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1B – Mendoza</p>

1C Cailyn Sky Mendoza (GUARD)

Case No. 08CEPR00223

Attorney Margoian, Michael J. (for Petitioners James Willhoit and Georgette Willhoit)
 Attorney Hopper, Cindy J. (for Samantha Willhoit, mother)
 Petitioner Mendoza, Angel (Pro Per Petitioner, paternal grandfather)
 Petitioner Garcia, Rebecca (Pro Per Petitioner, paternal grandmother)

**Petition to Modify Existing Visitation Orders for More Visitation; and
 Opposing Permanent Guardianship; Supporting Declaration**

		REBECCA GARCIA, paternal grandmother, and ANGEL MENDOZA, paternal grandfather, are Petitioners.	NEEDS/PROBLEMS/COMMENTS: THIS MATTER WILL BE HEARD IN DEPARTMENT 72 AT 8:30 A.M.	
Cont. from 082615		~Please see Petition for details~	<u>Continued from 8/26/2015.</u>	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input type="checkbox"/>	Verified			X
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			
<input type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			W/
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order			X
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: LEG	
			Reviewed on: 11/25/15	
			Updates:	
			Recommendation:	
			File 1C - Mendoza	