



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.

1 Manuel C Rodriguez (Estate) Case No. 05CEPR01418

Attorney Mortimer, Steven R (for Rogue Rodriguez – Administrator)

Probate Status Hearing Re: Filing First Account/Petition for Final Distribution

	<p>ROQUE RODRIGUEZ., son, appointed administrator with full IAEA authority with bond set at \$22,500.00 on 03/07/2006.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR</u> <u>First Account and Final Distribution filed 11/17/2015.</u> <u>Hearing set for 01/20/2016.</u></p> <p>1. Need First Account/and or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
	<p>Letters issued on 03/16/2006.</p>	
Cont. from 110515		
Aff.Sub.Wit.		
Verified		
Inventory	Inventory and Appraisal filed 03/16/2006 shows an estate valued at \$22,500.00 consisting of real property.	
PTC		
Not.Cred.		
Notice of Hrg	Order Confirming Sale of Real Property filed 08/06/2015.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.	Minute Order of 08/06/2015 set this Status Hearing for the filing of the First Account/Petition for Final Distribution.	
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 11/03/2015
		Updates:
		Recommendation:
		File 1 – Rodriguez

4 Charles Lee Jefferson (Estate) Case No. 08CEPR00469

Attorney Fanucchi, Edward L. (for Wanda Foster – Administrator)

Probate Status Hearing Re: Filing First Account and or Final Distribution

DOD: 12/12/2006	WANDA FOSTER , was appointed Successor Administrator with limited authority and bond set at \$245,700.00 on 10/22/2014.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Cont. from	Ex Parte Order Reducing Bond of \$245,700.00 to \$101,635.00 was filed 12/18/2014.	
Aff.Sub.Wit.	Receipt of bond filed 02/04/2015.	
Verified	Letters issued on 03/10/2015.	
Inventory	Final Inventory and Appraisal filed 12/12/2014 shows an estate valued at \$102,700.00.	
PTC	Minute Order of 10/22/2014 set this Status Hearing for the filing of the Petition for First Account and/or Final Distribution.	
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 11/24/2015
		Updates:
		Recommendation:
		File 4 – Jefferson

DOD: 8/15/13		<p>ALBERT FRANCO, Son and Co-Conservator, is Petitioner.</p> <p>Petitioner states that after their mother's death, Co-Conservator Patricia Leonard wanted him to take care of everything. He took over paying all bills for their mother's house in Fresno and has been dealing with this conservatorship. Ms. Leonard will not appear regarding this matter and when this conservatorship is dissolved, Petitioner will be the one to petition the court for the probate estate.</p> <p>Account period: 6/1/12 – 8/31/13 Accounting: \$121,910.31 / \$122,070.50 (Accounting does not balance) Beginning POH: \$92,518.86 Ending POH: \$90,639.43 (\$639.43 cash plus non-cash assets including real and personal property)</p> <p>Petitioner states the estate could not afford the cost of an accountant as noted to this court and the prior court. Petitioner has provided the bank statements.</p> <p>Petitioner waives compensation.</p> <p>Petitioner states the conservators had on file a bond totaling \$181,280.00. After the prior accounting, the court stated the bond was no longer necessary and it was canceled.</p> <p>Petitioner prays for an order that:</p> <ol style="list-style-type: none"> Notice of hearing on this account, report and petition be given as required by law; The Court make an order approving, allowing and settling the attached account and report of the Co-Conservators as filed; Further, due to the fact that the Conservatee died on 8/15/13, that the Court order this Conservatorship closed and dismissed. 	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Minute Order 10/15/15: Petitioner is informed that an amended petition needs to be filed. If filed two days prior to the hearing, no appearance is needed.</p> <p>As of 11/24/15, nothing further has been filed.</p> <p><u>SEE ADDITIONAL PAGES</u></p>
Cont. from 091715, 101515			
<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.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
Reviewed by: skc			
Reviewed on: 11/24/15			
Updates:			
Recommendation:			
File 6 – Kozera			

Page 2 – NEEDS/PROBLEMS/COMMENTS:

1. Need amended accounting due to, but not necessarily limited to, the following issues:
 - Account does not balance. Charges and Credits should match.
 - Beginning Property On Hand does not correspond to the Ending Property On Hand figure from the Second Accounting.
 - Need mandatory schedules, including summary, receipts, disbursements, etc.
 - The Conservatee passed away 8/15/13. Therefore, this should be a third and final account, containing two account periods: one for the period until her death, and one for the subsequent period after her death. See Probate Code §2620(b).
 - Petitioner requests termination of the conservatorship, but does not request distribution of the assets or indicate whether an estate has been opened.
2. The Court may require the participation and verification of this account by Co-Conservator Patricia Leonard, as she has not formally been removed Co-Conservator.
3. Petitioner states the bond was canceled after the prior accounting because the court said bond was no longer necessary; however, the Order on Second Account filed 2/21/13 states the current bond of \$181,280.00 is sufficient. It does not cancel bond. Need clarification regarding the status of the bond.
4. Need Notice of Hearing.
5. Need proof of service of Notice of Hearing on all relatives at least 15 days prior to the hearing pursuant to Probate Code §§ 2621, 1460(b)(6).
6. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing pursuant to Probate Code §1252 on Attorney Leigh W. Burnside due to the Request for Special Notice filed 8/25/11.
7. Petitioner's Declaration re bank statements states that the conservatorship technically stopped when the Conservatee died and the probate estate started, and he will account for and deal with the probate estate assets when he files the probate case. He and his sister are the only heirs.

The above statement is not a correct representation of how to deal with the transition from conservatorship estate to probate estate. See above #1, and also Probate Code §§ 2620(b) and 2630 with regard to accounting for the period subsequent to the conservatee's death. Petitioner may wish to seek legal advice from an attorney regarding how to proceed.

NEEDS/PROBLEMS/COMMENTS:

1. On 10/1/12, the Court authorized \$300/month for Ms. Pena for care of the minor. Disbursements Schedule indicates an increase to \$350/month in May 2014; however, Examiner is unable to locate an order authorizing this increase. The timing coincides with the authorization to purchase a vehicle, but the petition and order do not address increase. Need clarification.
2. On 4/23/15, the Court authorized investment of the minor's assets instead of holding the minor's funds in the Public Guardian's pooled trust account. This petition indicates gains of \$28.32 and losses of \$5,152.42 in the investment account, plus money management fees totaling \$1,437.91 for this account period. The Court may require clarification with reference to the best interest of the minor.
3. Also on 4/23/14, the Court authorized the Public Guardian to spend up to \$20,000.00 to purchase a vehicle to be used for the minor's benefit; however, it does not appear that any vehicle was purchased during this account period. The Court may require an update on the minor's situation.
4. Exhibit B indicates an estimated 13 Staff hours @ \$76/hr for preparation of the statement of services. Is this a typo? If so, need recalculation of fees. If not, the Court may require itemization. (Note: For example, for the first account, this task was estimated at 1.5 hours.)

Note: If granted, the Court will set a status hearing for the filing of the next account as follows:

- **Thursday, Sept. 1, 2016, if a one-year account is required; or**
- **Thursday, Aug. 31, 2017 if a two-year account is required.**

First and Final Report of Administrator on Waiver of Account and Petition for Final Distribution

DOD: 03/22/10	JOE GARCIA, II , Administrator, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 10/22/15 Minute Order from 10/22/15 states: The Petitioner might be allowed to make monthly payments on fees; the Court will inquire more on the issue.</p> <p>1. Petitioner opened this matter with a fee waiver; filing fees are a cost of administration. Petitioner and others are receiving property from the estate, therefore filing fees are due as follows:</p> <ul style="list-style-type: none"> • Petition for Probate, filed 02/07/12 - \$395.00 • Petition to Approve Settlement Agreement, filed 09/09/14 - \$435.00 • Petition for Final Distribution, filed 09/11/15 - \$435.00 <p>Total filing fees due: \$1,265.00</p>	
	Accounting is waived.		
Cont. from 102215	I & A - \$120,000.00		
<input type="checkbox"/> Aff.Sub.Wit.	POH - \$120,000.00 (no cash)		
<input checked="" type="checkbox"/> Verified			
<input checked="" type="checkbox"/> Inventory	Administrator - waived		
<input checked="" type="checkbox"/> PTC			
<input checked="" type="checkbox"/> Not.Cred.	Attorney - waived		
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	Distribution, pursuant to intestate succession, and the disclaimer/assignment of Joe Garcia, Sr., is to:		
<input type="checkbox"/> Aff.Pub.	Joe Garcia, II- 1/3 interest in real property as tenant in common		
<input type="checkbox"/> Sp.Ntc.	Crystal Garcia - 1/3 interest in real property as tenant in common		
<input type="checkbox"/> Pers.Serv.	Fernando Garcia - 1/3 interest in real property as tenant in common		
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters 03/22/12			
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input checked="" type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input checked="" type="checkbox"/> FTB Notice			
			Reviewed by: JF
			Reviewed on: 11/23/15
		Updates:	
		Recommendation:	
		File 8 - Garcia	

Petitioner Genia Kay Cherry (Pro Per)

Petition for Visitation

		<p>GENIA KAY CHERRY, mother, is Petitioner.</p> <p>JOSEPHINE M. LONGORIA-CONTENTE, paternal grandmother, was appointed Guardian on 6/5/2013.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Pursuant to Probate Code §§ 1460 and 1511, need proof of 15 days' service prior to the hearing of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Visitation</i> or <i>Consent and Waiver of Notice</i>, or <i>Declaration of Due Diligence</i>, for: <ul style="list-style-type: none"> • Josephine Longoria-Contente, Guardian. 																																												
<p>Cont. from</p> <table border="1"> <tr><td>Aff.Sub.Wit.</td><td></td></tr> <tr><td>✓ Verified</td><td></td></tr> <tr><td>Inventory</td><td></td></tr> <tr><td>PTC</td><td></td></tr> <tr><td>Not.Cred.</td><td></td></tr> <tr><td>Notice of Hrg</td><td>X</td></tr> <tr><td>Aff.Mail</td><td>X</td></tr> <tr><td>Aff.Pub.</td><td></td></tr> <tr><td>Sp.Ntc.</td><td></td></tr> <tr><td>Pers.Serv.</td><td></td></tr> <tr><td>Conf. Screen</td><td></td></tr> <tr><td>Letters</td><td></td></tr> <tr><td>Duties/Supp</td><td></td></tr> <tr><td>Objections</td><td></td></tr> <tr><td>Video Receipt</td><td></td></tr> <tr><td>CI Report</td><td></td></tr> <tr><td>9202</td><td></td></tr> <tr><td>Order</td><td>X</td></tr> <tr><td>Aff. Posting</td><td></td></tr> <tr><td>Status Rpt</td><td></td></tr> <tr><td>UCCJEA</td><td></td></tr> <tr><td>Citation</td><td></td></tr> <tr><td>FTB Notice</td><td></td></tr> </table>				Aff.Sub.Wit.		✓ Verified		Inventory		PTC		Not.Cred.		Notice of Hrg	X	Aff.Mail	X	Aff.Pub.		Sp.Ntc.		Pers.Serv.		Conf. Screen		Letters		Duties/Supp		Objections		Video Receipt		CI Report		9202		Order	X	Aff. Posting		Status Rpt		UCCJEA		Citation	
Aff.Sub.Wit.																																															
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Inventory																																															
PTC																																															
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UCCJEA																																															
Citation																																															
FTB Notice																																															
		<p>Reviewed by: LEG</p> <p>Reviewed on: 11/25/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 9 – Bell</p>																																													

12 Barber L. Mardis (CONS/PE) Case No. 14CEPR00530

Attorney Bagdasarian, Gary G. (for Sharon Shrives – Conservator)

Probate Status Hearing Re: Filing of the First Account

	SHARON SHRIVES , was appointed Conservator of the Person and of the Estate on 09/25/2014 with bond set at \$40,000.00.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Inventory and Appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
	Letters issued on 09/25/2014.	
Cont. from		
Aff.Sub.Wit.	Final Inventory and Appraisal filed 03/05/2015 showing and estate valued at \$10,072.48.	
Verified Inventory		
PTC		
Not.Cred.	Minute Order of 09/25/2014 set this Status Hearing for the filing of the First Account.	
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 11/24/2015
		Updates:
		Recommendation:
		File 12 – Mardis

13 Fred Rowley (Estate) Case No. 14CEPR00742

Attorney Shepard, Jeff S. (for Raynette Grant – Executor)

Probate Status Hearing RE: Filing of the First Account

DOD: 4/14/2014	RAYNETTE GRANT , Sister, was appointed Executor with Full IAEA with bond of \$60,000.00 on 9-25-14.	NEEDS/PROBLEMS/COMMENTS: 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.
	Letters issued 10-16-14.	
Cont. from		
Aff.Sub.Wit.	Final Inventory & Appraisal filed 02/05/2015 shows an estate valued at \$113,395.69.	
Verified Inventory		
PTC	Receipt of Bond Increase to \$113,500.00 filed 04/13/2015.	
Not.Cred.		
Notice of Hrg	Minute Order of 09/25/2015 set this Status Hearing for the 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: LV
		Reviewed on: 11/24/2015
		Updates:
		Recommendation:
		File 13 – Rowley

Report of Sale and Petition for Order Confirming Sale of Real Property (Prob. Code §10308)

DOD: 6/12/94		<p>JESUS M. MEJIA, Administrator with Limited IAEA without bond, is Petitioner.</p> <p>Sale price: \$60,000.00 Overbid: \$63,500.00</p> <p>Reappraisal: \$60,000.00</p> <p>Property: 4067 N. Duke Ave. Fresno, CA 93727</p> <p>Publication: Business Journal</p> <p>Buyer: Cruzin' Properties, LLC</p> <p>Broker: 6% or \$3,600.00 to RE/Max Advantage Plus</p> <p>Petitioner states the property is in extremely poor condition; consequently, a buyer was obtained willing to purchase on an "as is" basis at the appraised value. See Bid for Purchase of Real Property at Private Sale and Acceptance (Sales Agreement) filed 11/2/15.</p> <p>Petitioner requests to deposit proceeds into a blocked account at California Bank and Trust.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: If granted, the Court will set a status hearing for the filing of the receipt for blocked account for Thursday, January 20, 2016.</p>
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail		
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<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input checked="" type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: skc	
		Reviewed on: 11/25/15	
		Updates:	
		Recommendation:	
		File 15 – Mejia	

Attorney Michael D. Dowling (for Petitioner Rev. Msgr. Michael R. Braun)

Petition for Settlement of First and Final Account and for Final Distribution, for Allowance of Compensation for Ordinary Services of Executor, and for Allowance of Ordinary and Extraordinary Attorney's Fees and Reimbursement of Advanced Costs

DOD: 9/5/2014		REV. MSGR. MICHAEL R. BRAUN , friend and Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 9/5/2014 – 8/31/2015	
Cont. from		Accounting - \$624,107.56	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$600,201.41	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$502,364.98 <i>(\$502,361.67 is cash; \$3.31 stock)</i>	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	Executor - \$15,546.10 <i>(statutory)</i>	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Attorney - \$15,546.10 <i>(statutory)</i>	
<input checked="" type="checkbox"/>	Aff.Mail	Attorney XO - \$1,069.00 <i>(per itemization at Exhibit B, for .50 attorney hours @ \$430.00/hour and 6.10 paralegal hours @ \$140.00/hour, for services rendered to ascertain beneficiaries of assets outside of probate and facilitate their transfer;)</i>	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters 120814	Costs - \$530.00 <i>(filing fees, certified copies)</i>	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt	Closing - \$4,500.00 <i>(closing expenses and for any liabilities determined to be due;)</i>	
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202	Distribution is pursuant to Decedent's Will.	
<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: 11/25/15
			Updates:
			Recommendation:
			File 16 – Logan

18A Guillermina Conde (CONS/E) Case No. 15CEPR00307

Petitioner Jackson, Martha (Pro Per – Conservator)

Probate Status Hearing Re: Filing of the Inventory and Appraisal

	MARTHA JACKSON , Daughter, was appointed Conservator of the Estate only, without bond and all funds to be placed in a blocked account, on 06/30/2015.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>18B is the Order to Show Cause set per minute order of 10/22/2015.</p> <p>Minute Order of 10/22/2015: Martha Jackson is ORDERED TO PERSONALLY APPEAR or APPEAR by CourtCall on 12/03/2015 at 9:00am to show cause as to why she should not be removed as Conservator for not filing an Inventory and Appraisal.</p> <p>1. Need Inventory and Appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
	Letters issued on 07/02/2015.	
Cont. from 102215	<p>Notice of Status of Hearing for the filing of the Inventory and Appraisal was filed on 07/31/2015 and set this status hearing.</p> <p>Notice of Status of Hearing was mailed to Martha Jackson on 07/31/2015.</p>	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 11/24/2015
		Updates:
		Recommendation:
		File 18A – Conde

18A

18B Guillermina Conde (CONS/PE) Case No. 15CEPR00307

Conservator Jackson, Martha (Pro Per – Conservator)

Order to Show Cause

	MARTHA JACKSON , Daughter, was appointed Conservator of the Estate only, without bond and all funds to be placed in a blocked account, on 06/30/2015.	NEEDS/PROBLEMS/COMMENTS:
	Letters issued on 07/02/2015.	
Cont. from	Minute Order of 10/22/2015 set this Order to Show Cause. Minute Order states: Martha Jackson is ORDERED TO PERSONALLY APPEAR or APPEAR by CourtCall on 12/03/2015 at 9:00am to show cause as to why she should not be removed as Conservator for not filing an Inventory and Appraisal.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 11/24/2015
		Updates:
		Recommendation:
		File 18B – Conde

18B

DOD: 7/25/14		ANITA MARIE FERGUSON, named executor without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Full IAEA – ok	Minute Order 10/22/15: Notice has to be given to Anne Cortez. 12/3/15 will be the last continuance.
Cont from 050715, 061815, 081315, 092415, 102215		Will dated 3/14/04	The following issue now exists:
<input checked="" type="checkbox"/>	Aff.Sub.Wit.	Residence: Fresno	1. Notice to Ann Cortez was mailed on 11/23/15, which is only 10 days prior to the hearing. 15 days' notice is required by Probate Code §8110. Note: This case was opened with a fee waiver. Please note that upon distribution, all Court filing fees will be due. Note: If granted, the Court will set status hearings as follows: <ul style="list-style-type: none"> • Thursday, May 5, 2016 for filing the Inventory and Appraisal • Thursday, Feb. 2, 2017 for filing the first account or petition for final distribution If the proper items are on file per Local Rule 7.5, the status hearings may come off calendar.
<input checked="" type="checkbox"/>	Verified	Publication: Fresno Bee	
	Inventory	Estimated value of estate:	
	PTC	Personal property: \$8,000.00	
	Not.Cred.	Real property: \$31,000.00	
	Notice of Hrg	(\$55,000.00 encumbered for \$24,000.00)	
	Aff.Mail	Probate Referee: Steven Diebert	
<input checked="" type="checkbox"/>	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 11/24/15
			Updates:
			Recommendation:
			File 19 - Flemming

Probate Status Hearing RE: Filing Proof of Bond

	<p>GLORIA ANN BARRAGAN, Mother, filed a Petition for Creation and Funding of Pooled Special Needs Trust on 6/2/15.</p> <p>On 9/3/15, INLAND COUNTIES REGIONAL CENTER, INC., was appointed Trustee of the Adrian Luis Barragan Special Needs Trust on 9/3/15.</p> <p>A Supplemental Declaration filed 8/25/15 stated the trust consists of assets totaling \$137,996.87 as of 8/1/15 and calculates bond including assets, interest, and cost of recovery at \$180,400.00.</p> <p>At the hearing on 9/3/15, the Court set status hearing for the filing of the bond for 10/15/15.</p> <p>On 10/15/15, there were no appearances and the Court set an OSC as to the attorney re sanctions and as to the trustee re failure to post bond. See Page B.</p> <p>The minute order was mailed to the attorney and the trustee on 10/15/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Update: Bond was filed 11/23/15. This matter was not taken off calendar due to the OSC at Page B.</u></p> <p><u>Minute Order 10/15/15: Order to Show Cause issued for James Hurlbutt to show cause why you should not be sanctioned for Failure to Appear. Also Order to Show Cause to Inland Counties Regional Center to show cause why you should not be removed as trustee for failure to post bond. (See Page B re OSC)</u></p>
Cont. from 101515		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 11/24/15
		Updates:
		Recommendation:
		File 21A – Barragan

Order to Show Cause

	<p>GLORIA ANN BARRAGAN, Mother, filed a Petition for Creation and Funding of Pooled Special Needs Trust on 6/2/15.</p> <p>On 9/3/15, INLAND COUNTIES REGIONAL CENTER, INC., was appointed Trustee of the Adrian Luis Barragan Special Needs Trust on 9/3/15.</p> <p>A Supplemental Declaration filed 8/25/15 stated the trust consists of assets totaling \$137,996.87 as of 8/1/15 and calculates bond including assets, interest, and cost of recovery at \$180,400.00.</p> <p>At the hearing on 9/3/15, the Court set status hearing for the filing of the bond for 10/15/15.</p> <p>On 10/15/15, there were no appearances and the Court set an OSC as to the attorney re sanctions and as to the trustee re failure to post bond. See Page B.</p> <p>The minute order was mailed to the attorney and the trustee on 10/15/15.</p> <p>Update: Bond was filed 11/23/15.</p> <p>Declaration of James P. Hurlbutt re OSC filed 11/23/15 states he failed to correctly note the deadline to file the bond in his file and also failed to advise the trustee of the Master Trust of the deadline. He also failed to calendar the review hearing on 10/15/15. Mr. Hurlbutt submits his sincere apology to the Court for his failure to adhere to the deadline and to appear. Mr. Hurlbutt has now filed true and correct copies of the signed trust documents, the trustee's bond of \$180,400, and the inventory in the conservatorship matter 15CEPR00561.</p> <p>Mr. Hurlbutt states the assets of the conservatorship estate are still under the control of the conservator and arrangements are being made to distribute the assets to the trustee of the master trust in accordance with the court's order.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Update: Bond was filed 11/23/15.</u></p> <p>Reviewed by: skc</p> <p>Reviewed on: 11/24/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 21B – Barragan</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		

Petition for Appointment of Guardian of the Person

		<p align="center">NO TEMPORARY IN PLACE; TEMPORARY DENIED ON 08/27/15 DUE TO NO APPEARANCES</p> <p>TESSIEJARRA MACK, paternal grandmother, is Petitioner.</p> <p>Father: D'ANDRAE MARTIN, SR. – Consent & Waiver of Notice filed 11/18/15</p> <p>Mother: TRACEY MCBETH – Consent & Waiver of Notice filed 11/18/15</p> <p>Paternal grandfather: SMILEY MARTIN – Consent & Waiver of Notice filed 11/18/15</p> <p>Maternal grandparents: UNKNOWN</p> <p>Petitioner states [see file for details].</p> <p>Court Investigator Julie Negrete filed a report on 10/08/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 10/15/15</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: <ol style="list-style-type: none"> a. Maternal grandparents – service by mail ok
Cont. from 101515			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg x		
<input type="checkbox"/>	Aff.Mail x		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv. 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 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 22 – Martin	

Status Re: Filing Heggstad Petition

DOD: 5/27/15	<p>HARVEY A. ARMAS, Named Executor, filed a Petition for Probate of Will on 9/8/15.</p> <p>At the hearing on 10/15/15, the petition for probate was not granted and the Court ordered that a Heggstad be filed (with regard to the decedent's trust).</p> <p>The Court set this status hearing for the filing of such petition.</p> <p>On 11/6/15, Petitioner filed a Petition for an Order to Confirm Validity of Trust; Confirm Trustee; and Confirm Assets to Revocable Trust, which is set for hearing on 1/6/15 in this estate matter.</p> <p>However, the trust petition was filed into this estate matter, instead of being filed as a separate trust matter pursuant to Probate Code and Local Rules.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 11/12/15: If the petition is filed properly at least two court days prior, then no appearance is necessary on 12/3/15.</p> <p>As of 11/24/15, it does not appear that a new case has been filed as noted below.</p> <p>1. The petition filed 11/6/15 is in connection with the decedent's trust and as such must be filed separately from the estate. Therefore, this status hearing is not off calendar, because the petition was inappropriately filed in the estate case.</p> <p>Need petition filed as new trust case. See applicable law re trusts (Probate Code §17000 et seq.) and Local Rule 7.1.2, which requires that trusts be filed separately from estates.</p>
Cont. from 111215		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 11/24/15
		Updates:
		Recommendation:
		File 23 - Dostinich

Probate Status Hearing RE: Proof of Bond

Age:			NEEDS/PROBLEMS/COMMENTS:
DOD:			
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			
		<u>OFF CALENDAR</u>	
		Bond filed 11/12/15	
		Reviewed by: skc	
		Reviewed on: 11/25/15	
		Updates:	
		Recommendation:	
		File 25 – Miller	

Petition for Appointment of Guardian of the Person

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 11/25/15	
			Updates:	
			Recommendation:	
			File 26 – Flores	

Petition for Letters of Administration; Authorization to Administer under IAEA

DOD: 3/15/15		<p>MENNONITE BRETHREN HOMES, INC., a creditor, is Petitioner and requests appointment of the FRESNO COUNTY PUBLIC ADMINISTRATOR as Administrator with Full IAEA without bond.</p> <p>Full IAEA – ok</p> <p>Decedent died intestate</p> <p>Residence: Reedley Publication: Reedley Exponent</p> <p>Estimated value of estate: \$0</p> <p>Probate Referee: Rick Smith</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 11/19/15. The following issue remains noted for reference:</p> <ol style="list-style-type: none"> 1. Petitioner is a creditor and requests appointment of the Public Administrator as personal representative; however, the decedent was survived by a spouse and other family members who have priority of appointment. Petitioner does not allege that they have declined or refused to act. Need declinations to serve from all relatives pursuant to Probate Code §8461. 2. Need Letters signed by Public Administrator. <p><u>Note:</u> If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> • Thursday, May 5, 2016 for filing the Inventory and Appraisal • Thursday, Feb. 2, 2017 for filing the first account or petition for final distribution <p>If the proper items are filed prior to the status dates pursuant to Local Rule 7.5, the status hearings may come off calendar.</p>
Cont. from 111915			
<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 checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
Reviewed by: skc			
Reviewed on: 11/24/15			
Updates:			
Recommendation:			
File 33 – Thorpe			