



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.

2 The Christina Romar Beneficiary Trust (Special Needs Trust)

Case No. 10CEPR00596

Atty Sharbaugh, Catherine (for Petitioner/Trustee Good Shepard Fund)

(1) First Account and Report of Trustee of Christine Romar Beneficiary Trust; Petition to Settle Account; and (2) to Fix & Allow Trustee and Attorney Fees [Prob. C. 1060, 2620, and 17200(a)(5), Govt. C. 70652(d)]

Beneficiary age: 12 years DOB: 12/15/1998	<p>GOOD SHEPARD FUND, Trustee, is petitioner.</p> <p>Account period: 5/10/10 – 4-30-11</p> <p>Accounting - \$67,650.07 Beginning POH- \$0 Ending POH- \$66,916.53</p> <p>Trustee - \$721.25 (per itemization and declaration)</p> <p>Attorney - \$825.00 (per itemization and declaration 3.45 hrs @ \$220/hr)</p> <p>Petitioner prays for an Order:</p> <ol style="list-style-type: none"> 1. The court make an Order approving, allowing and settling the first account; 2. The court authorize and direct Petitioner to pay Trustee fees in the amount of \$721.25; 3. The court authorize and direct Petitioner to pay attorney fees in the amount of \$825.00. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Declaration re: Attorney fees states the attorney’s hourly rate is \$220.00. Itemization indicates she spent 3 hours to prepare this accounting and anticipates that she will spend .45 hours at the hearing for a total of 3.45 hours. Therefore the total attorney fee should be \$759.00 and not \$825.00 as prayed. A difference of \$66.00. 2. The Order establishing the Special Needs Trust states that the net settlement proceeds were \$127,142.55 of which \$50,000.00 was to be used to purchase a single premium fixed annuity. The Good Shepard fund, as Trustee of The Christina Romar Beneficiary Trust, was to manage, distribute, and dispose of these annuity funds as part of the trust. It does not appear that the proceeds of this annuity have been accounted for in this accounting. 3. The funds of this trust are held in a pooled account with others. Need authority that allows pooled accounts in a Special Needs Trust. 4. Bank statement shows the total amount of the pooled account but does not indicate the amount in the pooled account that belongs to this trust. The examiner is unable to verify that the account funds correspond with the property on hand.
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.		
<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 checked="" type="checkbox"/> 2620(c)		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT Reviewed on: 11/28/11 Updates: Recommendation: File 2 - Romar

First Amended Petition for Settlement of First and Final Account; Petition for Distribution and for Attorney's Compensation

DOD: 04/28/10	JOY C. CARSON , Executor, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Accounting is waived.	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.	I & A - \$53,000.00	
<input checked="" type="checkbox"/> Verified	POH - \$53,000.00	
<input checked="" type="checkbox"/> Inventory		
<input checked="" type="checkbox"/> PTC		
<input checked="" type="checkbox"/> Not.Cred.	Executor - waives	
Notice of Hrg	n/a	
Aff.Mail	n/a	
Aff.Pub.	Attorney - \$2,120.00 (statutory)(to be paid outside of the estate)	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters	Distribution, pursuant to Decedent's Will is to:	
Duties/Supp		
Objections	Joy C. Carson - 100% interest in real property located in Coalinga, CA, furniture, fixtures and tools.	
Video Receipt		
CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
<input checked="" type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 11/28/11
		Updates:
		Recommendation: SUBMITTED
		File 3 - Gentry

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

Age: 2
DOB: 07/23/08
Cont. from 032811, 050211, 062011, 091911
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

TEMPORARY EXPIRES 12/05/11

COLLEEN CARLSON, paternal grandmother, is Petitioner.

Father: **RYAN LUSK**, *consent and waiver of notice filed 02/04/11.*

Mother: **KATIE LUSK**, *personally served 02/06/11.*

Paternal Grandfather: **STEVE LUSK**, *consent and waiver of notice filed 02/04/11.*

Maternal Grandfather: **RANDALL LEON FACKLAM**, *Declaration of Due Diligence filed 02/04/11.*

Maternal Grandmother: **KIM ANAYA**, *served by mail 02/07/11*

Petitioner states that minor’s mother is using illegal prescription drugs regularly, not taking her medication for bi-polar disorder, and living with her boyfriend in a shed without proper heat, running water or a bathroom. Minor’s father is currently deployed in Afghanistan and therefore cannot care for minor.

Court Investigator Jennifer Young’s report was filed 03/21/11.

Declaration of mother, Katie Lusk dated 03/28/11 chronicles her visits and efforts to have contact with minor, and provides pictures of her current and previous living arrangements.

Court Investigator Jennifer Young’s supplemental report was filed 04/27/11.

Please see additional page

NEEDS/PROBLEMS/COMMENTS:

CONTINUED FROM 09/19/11

Minute Order from 09/19/11 states: Visits for Katie Lusk are ordered to take place through CYS, Comprehensive Youth Services. Katie Lusk is to have reasonable supervised visits as mutually agreed to by Katie and Colleen Lusk, arranged by CYS. The Court trusts further visits with the parties are better served in the Family Court. If a copy of a signed Family Law order is submitted to the Probate Court prior to 12/05/11, then the 12/05/11 date shall be removed from Calendar.

Note:

Order and letters list Petitioners name as Colleen Lusk, however previous order/letters and Petition has her name as Colleen Carlson. Court may require clarification.

Updates:

Contacts: copy of notes in file

Recommendation:

Reviewed by: JF/KT/JF

File 4 - Lusk

Declaration of Petitioner, Colleen Carlson, filed 04/29/11 states that since the last court appearance on 03/28/11, she has enrolled minor in a licensed day-care/pre-school. Petitioner also states that she administered drug tests to mother on two occasions before visits. Petitioner states that she had mother go through a witnessed collection and she had the mother watch as she sealed the sample and they both watched as the results showed positive. Further, she states that she then sent the samples to the lab for written results. The first drug test was administered on 04/03/11 and the mother tested positive for marijuana. The second test was administered on 04/10/11 and the mother tested positive for marijuana and methamphetamines. Attached to the declaration are the lab results of both drug tests. On the evening of 04/10/11 after the mother's visit, police arrived at Petitioners home for a "wellness check". Officers came into her home and left shortly after arriving stating, "there is nothing wrong here". According to the police department, the mother called and reported to police that Petitioner and her husband were high. Petitioner states that she then advised mother that all future visits would have to be through an agency. Petitioner states that the mother has not visited with minor since that time. Petitioner states that mother has threatened to kill her in the past and has threatened that if things do not go well for her, she will claim that Petitioner's husband molested minor. Petitioner also attached print outs from mother's facebook page showing that the mother's family is also concerned about mother's drug use. Finally, Petitioner states that the minor is thriving under her care and loves daycare.

Declaration of mother, Katie Lusk, filed 04/29/11 states that she feels it is in the child's best interest for the child to be in her care as she has been the minor's caretaker since birth and that she has a safe, clean and healthy home for minor. She states that she has heard that the minor's behavior has been affected by all of the changes. Mother further declares that she and her boyfriend, Anthony Stewart, are on the waiting list to start a 15 week parenting class through Exceptional Parents Unlimited. Mother also states that she has been seeing her psychiatrist with her last visit being 04/26/11. She further states that she has signed a consent form for the Court Investigator to obtain information from her doctor. Mother states that she feels that the court may have been misled by statements made by Petitioners and wants her daughter returned to her care.

Declaration of Anthony Stewart, mother's boyfriend, filed 04/29/11 states that he has been falsely accused of selling drugs and that he has a spotless criminal record. He further states that he has a wonderful family and would never do anything to jeopardize losing them.

Declaration of Colleen Carlson, filed 06/17/11 states that the mother, Katie Lusk, tested positive for marijuana on 05/25/11, suffered a miscarriage on 06/06/11, was kicked out of beauty school for not attending and did not attend the ordered supervised visits until early June 2011. Ms. Carlson further states that the minor is doing great and loves attending her pre-school.

(1) Petition for Final Distribution on Waiver of Accounting and (2) for Allowance of Attorney's Fees and Costs (Prob. C 11640, 10800, 10810, 10954)

DOD: 12/24/10		JEFFREY S. MUELLER, Administrator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need Order. Please note that pursuant to Local Rule 7.6.1A - All orders or decrees in probate matters must be complete in themselves. Orders shall set forth all matters ruled on by the court, the relief granted, and the names of persons, descriptions of property and/or amounts of money affected with the same particularity required of judgments in general civil matters. <u>Monetary distributions must be stated in dollars</u> , and not as a percentage of the estate. 2. The computation of the statutory attorney fee is incorrect in Exhibit B to the Petition. The attorney fee should be calculated on the full amount of the Inventory & Appraisal (\$566,747.85). It appears that only the amount listed in attachment 2 of the Inventory & Appraisal was used in Exhibit B. The Examiner calculates the statutory fee to be \$14,334.96. It is noted that the correct statutory amount is stated in item 26 of the Petition. 3. Item 3 of the Prayer requests that the statutory attorney fee be divided between three law firms in equal amounts of \$4,773.54; however, three equal amounts of the correct statutory fee (\$14,334.96) equals \$4,778.32. 4. The Petition does not specify the dollar value of the remaining property on hand available for distribution. It is noted that assets on hand are listed in Exhibit A to the Petition, however dollar values are not stated for each of the assets. Need clarification as to the dollar value of the property remaining on hand for distribution. 5. The Petition requests to distribute \$5,835.96 cash plus real property and all Morgan Stanley Smith Barney accounts. This is the amount of the assets on hand as stated in Exhibit A to the Petition. It does not appear that any funds have been deducted for payment of the statutory attorney fee. Need more information as to how the attorney fee will be paid. Further, it is unclear whether any of the Morgan Stanley Smith Barney accounts are cash.
		Accounting is waived.	
Cont. from		I & A - \$566,747.85	
<input type="checkbox"/>	Aff.Sub.Wit.	POH - Total value	
<input checked="" type="checkbox"/>	Verified	not specified	
<input checked="" type="checkbox"/>	Inventory	Administrator - waives	
<input checked="" type="checkbox"/>	PTC	Attorney - \$14,334.96	
<input checked="" type="checkbox"/>	Not.Cred.	(statutory) (to be paid in three equal payments of \$4,773.54 to Caswell, Bell & Hillison, LLP; Klein DeNatale Goldner Cooper Rosenlieb & Kimball, LLP; and Mikkelborg, Broz, Wells & Fryer, LLC.	
<input checked="" type="checkbox"/>	Notice of Hrg	Costs - \$2,152.49	
<input checked="" type="checkbox"/>	Aff.Mail	(for filing fees, publication, probate referee)	
	Aff.Pub.	Distribution, pursuant to intestate succession, is to:	
	Sp.Ntc.	Jeffrey S. Mueller - \$5,835.96	
	Pers.Serv.	cash, plus real property located in Twain Harte, CA and Fresno, CA, and various Morgan Stanley Smith Barney accounts.	
	Conf. Screen		
	Letters	03/30/11	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	9202		
	Order	x	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
Reviewed by: JF			
Reviewed on: 11/28/11			
Updates:			
Recommendation:			
File 5 - Marrs			

		TED R. FRAME , Trustee, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Petition does not include the names and addresses of each person entitled to notice. Probate Code §17201.</p> <p>2. Need Order</p> <hr/> <p>Reviewed by: KT</p> <p>Reviewed on: 11/28/11</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 6 - Coelho</p>
		Petitioner states:	
		The Trust is an irrevocable life insurance trust (“ILIT”) established 4/1/1996.	
Cont. from		The Settlor of the ILIT is Laverne T. Coelho.	
	Aff.Sub.Wit.	The beneficiaries of the ILIT are the children of the settlor, Frank J. Coelho, Jr., John D. Coelho, Terri Ann Coelho Alsup, Patricia Coelho Cox and Edward M. Coelho.	
✓	Verified	Article Fourteen of the ILIT is a No-Contest Clause. It provides as follows:	
	Inventory	“If any beneficiary under this instrument, singly or in connection with any other person or persons, contests in a court the validity of <u>this instrument or of any other trust</u> or last will of the Settlor or seeks to obtain an adjudication in any proceedings in any court that this trust or any of its provisions or <u>that such other trust</u> or will or any of their provisions are void, or seeks otherwise to void, nullify, or set aside this trust or any of its provisions, then that person’s right to take any interest given to him or her by this trust shall be determined as it would have been determined if the person had predeceased the execution of this instrument without surviving issue.” (Emphasis added)	
	PTC	When the ILIT was established by the Settlor, she and her husband, Frank J. Coelho, previously had established the Frank and Laverne Coelho Family Trust (“the Family Trust”). The beneficiaries of the ILIT were also named as beneficiaries of the Family Trust.	
	Not.Cred.	At the time the Settlor established the ILIT, the relationship between her and all of the beneficiaries of the ILIT were cordial ones.	
✓	Notice of Hrg		
✓	Aff.Mail		
	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		
	FTB Notice		

Please see additional page

Petitioner states the Settlor's intent and purpose in establishing the ILIT was to provide upon her death a tax-free fund, to be received from the life insurance policy proceeds, to be used by the beneficiaries of the ILIT, who were also beneficiaries of the Family Trust, to pay federal estate tax attributable to the assets of the Family Trust.

Since mid-1997, Respondent Edward M. Coelho has been adverse to the Settlor and to the other beneficiaries of the ILIT. Beginning in mid-1997, he filed and maintained several legal actions against the Settlor and other beneficiaries of the ILIT, claiming fraud and other wrongdoings by them. Those actions were subsequently settled, but the settlement was not fully consummated until mid-2011. There is strong hostility by Edward M. Coelho toward the other beneficiaries of the ILIT. There is every reason to believe that he would not cooperate with the other beneficiaries of the ILIT in carrying out the Settlor's intent and purpose.

Petitioner states Edward M. Coelho is no longer a beneficiary of the Family Trust, having been found to have violated the no-contest clause in the Family Trust as amended.

On or about 10/28/1999, the Court of Appeals of the State of California, Fifth District, filed its decision affirming the Trial Court's decision that the filing by Edward M. Coelho and his brother Vincent Coelho of several lawsuits against various family members violated the no-contest clause of the Family Trust. The California Supreme Court thereafter declined review, and the appellate opinion became final.

Respondents Christopher E. Coelho, Angela M. Coelho, Lauren K. Coelho and Meagan T. Coelho are the children of Respondent Edward M. Coelho and contingent beneficiaries of the ILIT should their father pre-decease them.

Petitioner alleges:

1. Respondent Edward M. Coelho having been found to have violated the no-contest clause in the Family Trust has also violated the no-contest clause of the ILIT.
2. Because Respondent Edward M. Coelho has violated the no-contest clause of the ILIT, he no longer is a beneficiary of the ILIT and his beneficial interest should be terminated as if he had predeceased the execution of the ILIT without surviving issue.
3. Because of the forgoing changes in circumstances no known to the Settlor and not anticipated by her at the time she established the ILIT, the continuation of the ILIT under the terms naming Respondent Edward M. Coelho as a beneficiary would defeat or substantially impair the accomplishment of the intent and purpose of the ILIT.

Wherefore, Petitioner requests that he be instructed by the Court not to include respondents, or any of them, the any trust distribution before, at, or following the death of the Settlor; that the Court determine that the beneficial interest of the Respondents in the ILIT have terminated because Respondent, Edward M. Coelho has violated the no-contest clause of the ILIT; or alternatively, that the ILIT be modified to exclude Respondents as beneficiaries.

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

DOD: 10/24/11		<p>LESLIE ANN CHESTER, named Executor without bond, is Petitioner.</p> <p>Petitioner is a resident of Waddell, Arizona.</p> <p>Full IAEA – ok</p> <p>Will dated 08/25/11</p> <p>Residence: Clovis Publication: The Business Journal</p> <p>Estimated Value of the Estate: Personal property - \$95,000.00 Annual income - 1,000.00 Total - \$96,000.00</p> <p>Probate Referee: RICK SMITH</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. The Petition is marked at item 5(a)(7) stating that the decedent is survived by issue of a predeceased child; however, no predeceased child is listed in item 8 of the Petition. Pursuant to Local Rule 7.1.1D - If a beneficiary, heir, child, spouse, or registered domestic partner in any action before the Probate Court is deceased, that person's date of death shall be included in the petition. 2. The Petition is marked at item 5(a)(1) stating that the decedent is survived by a spouse, and a spouse is listed in item 8 of the Petition; however, the petition is also marked at item 7(b) indicating the decedent had a predeceased spouse. Need clarification. <p><u>Note:</u> The court may require bond if the proposed personal representative resides outside California or for other good cause, even if the will waives bond, pursuant to California Rules of Court 7.201(b) and Probate Code 8571.</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit. s/p		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<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 checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: JF	
		Reviewed on: 11/28/11	
		Updates:	
		Recommendation:	
		File 9 - Porter	

Probate Status Hearing Re: Failure to File a First Account or Petition for Final Distribution; Failure to File Inventory and Appraisal (Prob. C. 12200, et seq)

DOD: 2/28/16	<p>MARIE E. DONALDSON and MAYNARD E. GOINS, were appointed Co-Executors with full IAEA authority and without bond on 11/21/06.</p> <p>Letters issued on 11/27/06.</p> <p>Inventory and appraisal was due on 3/27/07.</p> <p>First account or petition for final distribution was due on 11/27/07.</p> <p>This status hearing was set for the filing of the inventory and appraisal and for the filing of the first account or petition for final distribution.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 10/24/11. Minute order states Counsel advises the Court that the accounting is done, but he needs more time.</p> <p>1. Need current status report or inventory and appraisal and first account or petition for final distribution.</p>
Cont. from 072511, 102411		
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: KT	
	Reviewed on: 11/28/11	
	Updates:	
	Recommendation:	
	File 10 - Goins	

Atty Matsumoto, Russell D. (for Sandra Edmiston & Sheridan Rodkey – Trustees)

Atty Smoot, John E. of Willits (for Peggy Walton – Contestant)

Atty Howk, Robert L. (it is unclear who he is representing, but appeared at 10/03/11 hearing)

Status Hearing Re: Petition of Trustees for Instructions and Confirmation of Report of Trust Administration, First and Final Accounting, and Proposed Final Distribution of Trust Estate (Prob. C. 17200, et seq)

	SANDRA EDMISTON and SHERIDAN RODKEY , as Trustees of the BETTY LAHARGOUE LIVING TRUST filed a Petition for Instructions and Confirmation of Report of Trust Administration, First and Final Accounting, and Proposed Final Distribution of Trust Estate on 08/18/11 with a hearing set for 10/03/11.	NEEDS/PROBLEMS/COMMENTS:
		<u>CONTINUED FROM 10/03/11</u>
		As of 11/23/11, no additional documents have been filed.
		1. Need Status update report.
	Objections to Fiduciaries' Account and Request for Surcharge of Fiduciary and other Remedies filed 09/28/11 by PEGGY WALTON, contestant and trust beneficiary.	Note to Judge: There is an order in the file that was submitted in connection with the Petition filed by Trustees on 08/18/11 and heard on 10/03/11. This order distributes the Real Property as Tenants in Common.
	Minute Order from hearing on 10/03/11 set this matter for status and states: Mr. Matsumoto is appearing via conference call. The Court orders that there be no expenditures by the trust without a noticed hearing and order of the court. The Court advises counsel that it will entertain an order shortening time.	
	First Supplement to First and Final Account filed 10/04/11 by Trustees Sandra Edmiston and Sheridan Rodkey supplements the First and Final Account included in the Petition filed 08/18/11 without any change, modification, or amendment of any portion of that petition and sets forth the charges and credits the Trustees' were entitled to for the period of 07/12/11 – 08/11/11.	
Cont. from 103111		
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: JF
		Reviewed on: 11/23/11
		Updates:
		Recommendation:
		File 11 - LaHargoue

Age: 62	<p>PUBLIC GUARDIAN was appointed Conservator of the Person and Estate with medical consent and dementia medication powers on 10-4-11.</p> <p>At the hearing on 10-4-11, the Court directed that Ms. Rodriguez be placed in a facility that provides sign language interpreters and set this status hearing regarding facility placement.</p> <p>Minute Order 10-4-11 states: The Court hears argument from both counsel. The Court grants the petition for conservatorship of the person and estate with medical powers. The Court directs that Margarita Rodriguez be placed in a facility that provides sign language interpreters. The Court orders Roy Rodriguez to turn over the debt card, video phone, and the account in which the funds are in as well as the person's name. The matter is set for Status Hearing Re: Facility on 12/5/11; Status Hearing Re: Filing of the Inventory and Appraisal on 2/6/12, and Status Hearing Re: Accounting on 1/16/13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> Pursuant to a Post-Move Notice of Change of Residence filed 8-31-11 (during temporary conservatorship), Ms. Rodriguez was placed at Chowchilla Convalescent at 1010 Ventura Ave., in Chowchilla, CA as of 8-25-11.</p> <p>1. Need status of placement.</p> <p>The Court may require the following forms with updated information:</p> <ul style="list-style-type: none"> - Determination of Conservatee's Appropriate Level of Care (Mandatory Judicial Council Form GC-355) - Post-Move Notice of Change of Residence.
DOB: 3-1-49		
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 X		
UCCJEA		
Citation		
FTB Notice		
	<p>Reviewed by: skc</p> <p>Reviewed on: 11-28-11</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 12 - Rodriguez</p>	

13A Desiree Domenici and Diana M. Alanis (GUARD/P) Case No. 03CEPR01567

Atty Alanis, Christina G. (Pro Per – Maternal Grandmother – Guardian)

Atty Domenici, Connie Mae (Pro Per – Paternal Grandmother)

Petition for Termination of Guardianship (Prob. C. 1460, 1601, 2626, 2627, 2636)

Desiree Aurora Domenici Age: 13 DOB: 11-6-97	CHRISTINA ALANIS , Maternal Grandmother and Guardian, is Petitioner. Petitioner was appointed Guardian of both minors on 2-23-04. Father: Jason Domenici Mother: Lisa M. Sandoval (Deceased) Paternal Grandfather: Richard Domenici Paternal Grandmother: Connie Domenici Maternal Grandfather: Deceased Petitioner states Desiree wishes to stay with her paternal grandparents, Connie and Richard Domenici. Connie Domenici filed a petition for guardianship of Desiree that is set for hearing on 12-5-11. Court Investigator Jo Ann Morris filed a report on 11-18-11.	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> This petition is for termination of guardianship for Desiree only. <u>Note:</u> Paternal Grandmother Connie Domenici's petition for appointment as Successor Guardian is Page 13B. This matter was continued to meet up with the successor guardianship petition. 1. Need Notice of Hearing. 2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing per Probate Code §1460(b)(5) or consent and waiver of notice or declaration of due diligence on: - Desiree Dominici (Minor age 13) - Jason Domenici (Father) - Richard Domenici (Paternal Grandfather)
Cont. from 101711		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
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		Reviewed by: skc
		Reviewed on: 11-28-11
		Updates:
		Recommendation:
		File 13A – Domenici & Alanis

13B Desiree Domenici and Diana M. Alanis (GUARD/P) Case No. 03CEPR01567

Atty Alanis, Christina G. (Pro Per – Maternal Grandmother – Current Guardian)

Atty Domenici, Connie Mae (Pro Per – Paternal Grandmother – Petitioner)

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

Desiree Aurora Domenici Age: 13 DOB: 11-6-97		<p>CONNIE MAE DOMENICI, Paternal Grandmother, is Petitioner.</p> <p>CHRISTINA ALANIS, Maternal Grandmother, was appointed Guardian of both minors on 2-23-04. - <i>Guardian requests termination of her guardianship of Desiree only in favor of this Petition.</i></p> <p>Father: Jason Domenici Mother: Lisa M. Sandoval (Deceased) Paternal Grandfather: Richard Domenici Paternal Grandmother: Connie Domenici Maternal Grandfather: Deceased</p> <p>Petitioner states Desiree wishes to live with her and she wishes to take over as Desiree’s guardian for the maternal grandmother.</p> <p>Court Investigator Jo Ann Morris filed a report on 11-18-11.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> This petition is for guardianship of guardianship for Desiree only.</p> <p>3. Need Notice of Hearing.</p> <p>4. Need proof of personal service of Notice of Hearing at least 15 days prior to the hearing per Probate Code §1511 or consent and waiver of notice or declaration of due diligence on: - Desiree Dominici (Minor age 13) - Jason Domenici (Father)</p> <p>5. Need proof of service of Notice of Hearing at least 15 days prior to the hearing per Probate Code §1511 or consent and waiver of notice on: - Richard Domenici (Paternal Grandfather)</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>X</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>✓ Clearances</td><td></td></tr> <tr><td>✓ Order</td><td></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.	X	✓ Conf. Screen		✓ Letters		✓ Duties/Supp		Objections		Video Receipt		✓ CI Report		✓ Clearances		✓ Order		Aff. Posting		Status Rpt		✓ UCCJEA		Citation		FTB Notice
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