



Monday, December 5, 2016

The Probate Examiner's Office recommends approval of the following Probate matters:

15 16CEPR00164 Robert J. Hixon, Jr. (Estate)
25 16CEPR01067 Alejandra Iniguez (Spousal)

Appearance of counsel is recommended for all remaining Probate matters set for hearing.

Thank you.

Dept. 303, 9:00 a.m. Monday, December 5, 2016

1 Skilit Ruby Barajas & Richard Barajas(GUARD/P) Case No. 07CEPR00504

Petitioner: Mirna Aquilera (Pro per - Mother)

Guardian: Juanita Abdulla (Pro per – Paternal grandmother)

Petition for Visitation

		MIRNA AQUILERA , mother, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 10/24/2016. Examiner notes provided in open court. As of 11/29/2016, the following issues remain:</p> <p>Petitioner:</p> <ol style="list-style-type: none"> 1. Fee waiver was denied on 9/15/16. Therefore a filing fee of \$60.00 is due. 2. Need <i>Notice of Hearing</i>. 3. Need proof of service of the <i>Notice of Hearing</i> on: <ol style="list-style-type: none"> a. Juanita Abdulla (guardian)** b. Skilit Barajas (minor) c. Richard Barajas (minor) <p>Guardian:</p> <ol style="list-style-type: none"> 1. Need proof of service of Declaration re: visitation filed on 10/20/2016 on: <ol style="list-style-type: none"> a. Mirna Aquilera (petitioner/mother)** <p>**Proof filed 10/26/2016 does not include the name of document served nor the date of service at #4.</p>
		JUANITA ABDULLA , paternal grandmother, was appointed guardian of Skilit on 8/13/07 and guardian of Richard on 2/13/16.	
Cont. from 102416			
	Aff.Sub.Wit.		
✓	Verified	Declaration filed 10/20/2016 by Juanita Abdulla.	
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X Please see petition for details	
	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		
	FTB Notice		
Reviewed by: KT / SEF			
Reviewed on: 11/29/2016			
Updates:			
Recommendation:			
File 1- Barajas			

Attorney Marcella Downing (for Petitioner Emily J. Abell, granddaughter)
 Attorney Marvin Helon (Court-appointed for Conservatee)

Petition for Appointment of Conservator of the Person

		TEMPORARY EXPIRES 12/5/2016	NEEDS/PROBLEMS/COMMENTS:
		EMILY J. ABELL, granddaughter, is Petitioner.	
		~Please see Petition for details~	1. Petition requests medical consent and dementia powers. Need Medical Capacity Declaration (Judicial Council form GC-335), with the mandatory Dementia Attachment to Capacity Declaration - Conservatorship (mandatory-use Judicial Council form GC-335A) to be filed as part of the Capacity Declaration completed by the physician, in support of Petitioner's request pursuant to Probate Code § 1890(c).
Cont. from		Declaration of Renee Garcia [Deputy Public Guardian] in Support of Petition filed 10/25/2016.	
<input type="checkbox"/>	Aff.Sub.Wit.	Court Investigator's Report filed 11/22/2016.	
<input checked="" type="checkbox"/>	Verified	Status Report of Petitioner and Request for Continuance filed by Attorney Downing for Petitioner EMILY J. ABELL on 11/30/2016.	
<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 checked="" type="checkbox"/>	Pers.Serv.	w/	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input checked="" 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 type="checkbox"/>	UCCJEA		
<input checked="" type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 11/29/16
			Updates: 11/30/16
			Recommendation:
			File 2- Mosesian

Fourth Account and Report of Conservator of the Estate

		<p>JEFFREY DALE, Spouse and Conservator of the Estate with bond of \$340,000.00, is Petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p style="text-align: center;">Amended Fourth Account filed 11/29/16 is set for hearing 1/25/17</p>
<p>Account period: 10/1/14 – 8/1/16</p>		<p>Accounting: \$0</p> <p>Beginning POH: \$0</p> <p>Ending POH: \$0</p>	
<p>Cont. from 092616, 102416</p>			
	Aff.Sub.Wit.	<p>Petitioner states the conservatorship is assetless since the last accepted account. During the period of the account, there were no cash assets. The conservatorship estate ran out of funds in 2013 and the conservatee's debts were paid from funds borrowed by the conservator, who is the conservatee's husband.</p>	
✓	Verified		
	Inventory	<p>Petitioner states he has received no compensation for his services and is requesting none at this time.</p>	
	PTC		
	Not.Cred.	<p>The Conservatee resides at Cottonwood Court), a locked residential care facility in Fresno.</p>	
✓	Notice of Hrg		
✓	Aff.Mail	<p>GORDON PANZAK will continue as conservator of the person.</p>	
	Aff.Pub.		
	Sp.Ntc.	<p>Petitioner requests that:</p> <ol style="list-style-type: none"> 1. The court finds that the Notice of Hearing on this account, report and petition was given as required by law; 2. The Court make an order approving, allowing and settling the account and report of the conservator in all respects as filed; and 3. The Court grant such other relief as it considers just and proper. 	
	Pers.Serv.		
	Conf. Screen	<p>Reviewed by: skc</p>	
	Letters		
	Duties/Supp	<p>Reviewed on: 11/28/16</p>	
	Objections		
	Video Receipt	<p>Updates: 11/29/16</p>	
✓	CI Report		
	2620(c)	<p>Recommendation:</p>	
	Order		
	Aff. Posting	<p>File 3A- Dale</p>	
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Page 2 – NEEDS/PROBLEMS/COMMENTS:

1. Pursuant to Probate Code §1061(a)(1), the property on hand at the beginning of the account period shall be the property on hand at the end of the prior account period.
The Third Account, which was settled on 2/4/15, contained multiple account periods, the last of which ended on 6/30/14 with an ending POH value of \$280,144.59 (cash plus a one-half interest in real property).
This Fourth Account begins 10/1/14, leaving a 3-month period unaccounted for, and does not correspond to the assets on hand and the end of the prior account.
2. A Request for Special Notice was filed 8/23/16 by William Freed, Esq., attorney for Debbie Duehning, conservator of George McLain, IV. Need notice pursuant to Probate Code §1214, 1252.
3. Need facility statements pursuant to Probate Code §2620(c)(5).
4. The Court may require clarification as to whether the Conservatee receives Social Security or other income, and if so, whether it is handled by Petitioner as payee or by the care facility as share of cost.

Need order. Local Rule 7.1.1.F.

Conservator of the Estate's Motion to Exonerate Bond of Assetless Conservatorship and Motion to Waive Bond and Order

		<p>JEFFREY DALE, Conservator of the Estate, is Petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
		<p>Petitioner states he was appointed conservator of the estate in 2008 and has satisfactorily performed his duties to date. The accounting has been duly filed and accepted by this court. The last accounting showed that all assets have been correctly and lawfully expended on behalf of the Conservatee. The estate is assetless, and there appears to be no need for future annual bonds to be imposed on the conservator of the estate. The Conservator of the Estate is informed and believes that an old bond placed upon the conservator in 2009 is still in place.</p>	<p><u>Minute Order 10/28/16</u>: Mr. Panzak requests 45 days.</p>
<p>Cont. from 092616, 102416</p>			
	Aff.Sub.Wit.	<p>Petitioner prays that the Court find good cause exists and the court order that the bond be exonerated and waive the requirement for an annual bond on Mr. Dale.</p>	<p>Note: Petitioner filed an Amended Fourth Account that is set for hearing on 1/25/17; however, Petitioner has not requested that this motion be continued; therefore, it remains on calendar.</p> <p>5. A Request for Special Notice was filed 8/23/16 by William Freed, Esq., attorney for Debbie Duehning, conservator of George McLain, IV. Need notice pursuant to Probate Code §1214, 1252.</p> <p>6. The proposed order is not in compliance with Local Rule 7.6.1.F. Need revised order.</p>
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			<p>Reviewed by: skc</p>
			<p>Reviewed on: 11/28/16</p>
			<p>Updates: 11/29/16</p>
			<p>Recommendation:</p>
			<p>File 3B- Dale</p>

Fifth Account Current, Report of Conservator and Petition for Its Settlement, and for Allowance of Attorneys' Fees and Costs

		<p>JOSEPH KALASHIAN, Brother and Conservator with bond of \$367,429.48, is Petitioner.</p> <p>Account period: 1/1/15 – 7/31/16 Accounting: \$627,590.24 Beginning POH: \$572,567.86 Ending POH: \$314,946.93 (\$15,317.98 cash plus investments, personal property, vehicle, annuity)</p> <p>Conservator waives compensation.</p> <p>Petitioner states he loaned the conservatorship estate \$12,500 during the account period for rent and bills until the real property sold. Petitioner was reimbursed \$9,000.00 on 5/3/16 (upon sale of the house; the balance of \$3,500.00 is still due and owing, as listed on the Liabilities Schedule.</p> <p>In addition, Petitioner paid the attorney's fees and costs of \$4,993.00 granted in the Court's order of 4/9/15 from his personal account. This amount is also listed on the Liabilities Schedule.</p> <p>Attorney: \$10,942.50 (for 17.6 attorney hours and 41.3 paralegal hours in connection with accountings, appearances, document prep, sale of real property. See Declaration filed 10/17/16.)</p> <p>Costs: \$1,470.25 (filing, delivery/runner services, cert. copies, per Declaration filed 10/17/16)</p> <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Petitioner did not use the Mandatory Judicial Council Form Summary of Account. See Cal. Rule of Court 7.101(a). Petitioner purchased a fixed index annuity during the Fourth Account period, and opened an investment account during this Fifth Account period and purchased five mutual funds at \$46,000.00 each, for a total of \$230,000.00. The Court may require clarification or authority for making these investments without bringing a noticed petition, as Probate Code §2459(b) only authorizes a conservator to maintain existing plans/accounts, and these investments do not appear to fall under the types specifically authorized by Probate Code §2574. Note: Schedule H, POH at close of account, reflects that the market values of the newly purchased mutual funds decreased from the purchase price. Total market value is \$4,871.42 less. Petitioner states he loaned the conservatorship estate \$12,500 plus \$4,993.00 during the account period and was paid back \$9,000.00 (after the sale of the house), and \$8,493.00 remains owing to him. However, this petition does not request reimbursement from the estate. The Court may require clarification.
	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		
✓	2620(c)		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 12/1/16
			Updates:
			Recommendation:
			File 4- Kalashian

Page 2

Separate Account: The Conservatee had substantial credit card debt which was paid off and cards cancelled. Since then, Petitioner provides the Conservatee with cash on a periodic basis for personal expenditures such as gas, personal items, groceries, clothes. The Conservatee maintains a separate account at Bank of America to deposit the cash given to her (the Separate Account) as her way of maintaining a measure of control over her finances. This gives her a level of independence she is content with in the context of conservatorship. See Order Settling Second Account entered 2/7/12.

Annuity: Petitioner purchased a fixed index annuity backed by corporate and municipal bonds from Sagikor Life Insurance on 2/24/14 during the Fourth Account period. It has a guaranteed interest rate of 1.5% and can earn up to 4.0% based on the S&P 500. It is a 5-year contract with the option to renew. Petitioner can withdraw 10% of the contract value without penalties; over 10% is treated as partial surrender and charges apply. Petitioner did not withdraw more than 10% of the contract during this account period. (Schedule E indicates \$6,500.00 in redemptions as losses; Schedule H reflects reduction of the carry value from \$65,000.00 to \$58,500.00.)

Mutual Funds: During this Fifth Account period, Petitioner opened an investment account with Capital Corporation and purchased five mutual funds at a total of \$230,000 on 6/27/16. (See Schedule H POH for specific investments)

Petitioner states the Conservatee receives Social Security as her only source of income at the current rate of \$435/month, which is deposited into her Separate Account pursuant to the Court's Order Settling Second Account entered 2/7/12. See Exhibit B for schedule of Social Security payments based on information and belief. Petitioner states the Conservatee's income is supplemented with income generated from the Capital Corporation investment account.

Real property: The real property of the conservatorship estate was sold 4/21/16 pursuant to Order Confirming Sale entered 4/14/16. See final settlement statement at Exhibit C. The Conservatee currently resides in an apartment in Fresno.

Bond: Current Bond is \$367,429.48. Petitioner estimates the annual gross income to be \$100.00 (dividends and interest income). Petitioner states current bond is sufficient. Since Petitioner does not control the Social Security income, Petitioner requests that it not be included in the bond calculation.

Petitioner prays for an order:

1. Approving, allowing and settling the attached account and report of conservator as filed;
2. Authorizing and directing Petitioner to pay his attorneys, the law firm of Dowling Aaron Incorporated, fees in the amount of \$10,942.50 for legal services, and costs of \$1,470.25, for a total of \$12,412.75; and
3. Such further orders be made as this Court deems proper.

Attorney Curtis D. Rindlisbacher (for Petitioner Gary S. Dunn, CPA)

First Account and Report of Conservator of the Estate, Gary S. Dunn, CPA, and Petition for Allowance of Fees to Conservator

		<p>GARY S. DUNN, CPA, Conservator of the Estate, is Petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Local Rule 7.16(A) provides that conservator commissions in conservatorship matters are awarded based upon what is just and reasonable. The Court's determination must be based upon <i>the justness and reasonableness of the amount of the request in relation to the total value of the conservatorship estate</i>. While it is noted that the account period spans nearly four years of services from the Conservator, Court may require justification for Conservator's \$225.00 hourly rate, given the value of the conservatorship estate and based upon typical hourly rates of conservators. (For comparison, when serving as conservator, Deputy Public Guardian rate is \$96.00 per hour.)</p> <p>~Please see additional page~</p>
		<p>Court Investigator's Report filed 8/3/2016.</p>	
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
✓	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
✓	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	2620		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			<p>Reviewed by: LEG</p> <p>Reviewed on: 11/29/16</p> <p>Updates: 11/30/16; 12/1/16</p> <p>Recommendation:</p> <p>File 5- MacFaddin</p>

5 Additional Page, George Edward MacFaddin, Jr. (CONS/PE)Case No. 12CEPR00233

NEEDS/PROBLEMS/COMMENTS, continued:

2. *Schedule C, Disbursements*, shows expenditures to the City of Fresno totaling **~\$3,542.23** for utilities, and to PGE totaling **~\$562.28** for electricity. Conservatee has resided at New Light Residential Care Home since ~April 2013, paying **\$3,500.00** per month for group home care; therefore, it appears payments for PGE and utilities are inappropriately made by the conservatorship estate, and the *Petition* is silent as to explanation for such expenditures.
3. *Schedule C, Disbursements*, shows payment on 3/2/2015 of **\$11,515.00** for City of Fresno – condemnation penalties on home, and on 7/22/2015 of **\$500.00** to City of Fresno – re-inspection fees, without explanation in the *Petition*.
4. *Schedule C, Disbursements*, shows **\$200.00** monthly payments beginning 11/24/2014, for gardening payments totaling **~\$3,600.00** during the account period, for which Court may require justification as a reasonable expenditure, given that Conservatee does not reside in the real property.
5. *Schedule A, Receipts* shows deposits on 5/15/2012 of **\$2,472.57**, and on 4/23/2013 of **\$6,000.00** without explanation in the *Petition*.
6. *Schedule A, Receipts* shows receipts to the conservatorship estate of various payments totaling **~\$197,000.00** from the **MILDRED MacFADDEN TRUST, MacFADDIN CHARITABLE REMAINDER TRUST**, and the **GEORGE MacFADDIN TRUST**, without explanation in the *Petition*.

Note: Court will set status hearing as follows:

- **Thursday, August 30, 2018 at 9:00 a.m. in Dept. 303** for the second accounting.

Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.

Dept. 303, 9:00 a.m. Monday, December 5, 2016

Atty Fanucchi, Edward L. (for Gerald Ishii – Beneficiary – Petitioner)
 Atty Burnside, Leigh W. (for Leslie Ishii – Co-Trustee – Respondent)

Status RE: Filing of a Request for Dismissal

	<p>GERALD ISHII, Beneficiary and Co-Trustee, filed Petition of Beneficiary to Remove Successor Co-Trustees, Appoint Temporary Successor Trustee, and for Payment of Attorneys' Fees and Costs on 5/17/12. The petition was set for hearing on 7/2/12.</p> <p>LESLIE ISHII, Beneficiary and Co-Trustee, filed Objection on 6/21/12.</p> <p>After numerous status and settlement hearings, the Court set this status hearing re the filing of a Request for Dismissal.</p> <p>Status Declaration of Leigh Burnside filed 12/1/16 states upon further consultation with Les Ishii's accountant, she has determined that the distribution and transfer of Candy Ranch to Les Ishii needs to be completed through the execution and recording of three separate deeds. She is working with the accountant to confirm the correct ownership percentages to be reflected in the deeds. She is also waiting for confirmation from Mr. Fanucchi's office of the amount of crop proceeds held in his firm's client trust account that will be disbursed to Les Ishii under the terms of the settlement agreement. Ms. Burnside believes this matter can be taken off calendar as they have a signed settlement agreement and the dispute has been resolved. They are simply in the process of carrying out the terms of the agreement. Should either party fail to perform, his appropriate remedy would be a motion to enforce the agreement under CCP §664.6.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Request for Dismissal signed by both attorneys.</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: skc
		Reviewed on: 11/28/16
		Updates: 12/2/16
		Recommendation:
		File 6- Ishii

DOD: 2/15/13	AMBER LYNNE WHITE , Daughter, was appointed as Executor with Full IAEA without bond on 5/13/13.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 12/14/15: Counsel requests additional time due to complications with the property.</p> <p>1. Need first account or petition for final distribution pursuant to Probate Code §12200.</p>
Cont. from 071114, 111014, 020215, 050415, 091415, 121415, 060616	At the hearing on 5/13/13, the Court set this status hearing for the filing of the petition for final distribution pursuant to Probate Code §12200.	
Aff.Sub.Wit.	I&A filed 9/4/13 indicates a total estate value of \$585,750.00 consisting of decedent's interest in various real property.	
Verified		
Inventory		
PTC		
Not.Cred.	Status Report filed 6/3/16 states there has been an agreement to purchase and joint escrow instructions between Team 5 Properties Inc. (Buyer) and Cindy Gill and Amber Whit, executor (the two undivided 50% owners). \$70,000 has been deposited by Buyer to date towards the purchase price of \$825,000, the estate's share being one-half. The agreement calls for closing to take place the earlier of six months from 5/11/16 or 15 days after the Army Corp of Engineers approves a plan for Dog Creek.	
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections	Status Report filed 9/23/16 states closing will conclude once final approval by the Corp. of Engineers is received for Dog Creek, which adjoins said real property.	
Video Receipt		
CI Report		
9202	Status Report filed 11/22/16 states the executor and other owner have sold the property for \$412,500 each. Closing took place on 11/8/16. The personal representative had a question for the title company re tax withholding on the closing statement, which was delayed due to the escrow officer being on vacation. The question has now been answered and a final report is currently being prepared and will be filed in the very near future.	
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 11/29/16
		Updates:
		Recommendation:
		File 7 - Doolittle

Petitioner: Guadalupe Velasquez (Pro per – Mother)

Guardian: Trinidad Velasquez (Pro per – Maternal grandmother)

Petition for Termination of Guardianship

		GUADALUPE VELASQUEZ , mother, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Petition is as to Giovanni Velasquez only. (Petition was dismissed as to Trinidad Velasquez.)</p> <p>1. Need proof of service of <i>Notice of Hearing</i> at least 15 days before the hearing <u>or</u> consents and waivers of notice <u>or</u> declarations of due diligence for the following:</p> <ul style="list-style-type: none"> a. Father (unknown) b. Paternal grandparents (unknown) c. Manuel Velasquez (maternal grandfather) d. Valerie Alvarado (sibling) – if 12 years or older e. Andrea Alvarado (sibling) – if 12 years or older 	
		TRINIDAD VELASQUEZ , maternal grandmother, was appointed guardian of Geovanni on 4/7/2014.– personal service 10/14/2016.		
Cont. from		Objections filed by Trinidad Velasquez (guardian/maternal grandmother) on 10/19/2016.		
<input type="checkbox"/>	Aff.Sub.Wit.	Court Investigator report filed 11/28/2016.		
<input checked="" type="checkbox"/>	Verified	Declaration by Guadalupe Velasquez (petitioner/mother) filed 11/30/2016.		
<input type="checkbox"/>	Inventory	<i>Please see petition for details.</i>		
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			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 checked="" 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: SEF	
			Reviewed on: 11/29/2016	
			Updates: 12/1/2016	
			Recommendation:	
			File 8- Velasquez	

Petitioner Amanda Jean Freitas (Pro Per, mother)

Probate Status Hearing Re: Proof of On-Going Counseling

	<p>AMANDA JEAN FREITAS, mother, filed a <i>Petition for Termination of Guardianship</i> as to Beau Frietas only on 8/23/2016.</p> <p>Confidential Declaration filed by Co-Guardians CODIE AZEVEDO and NICHOLAS AZEVEDO on 11/22/2016.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cont. from		
Aff.Sub.Wit.		
Verified		
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Notice of Hrg		
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Duties/Supp		
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Video Receipt		
CI Report		
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Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	Reviewed by: LEG	
	Reviewed on: 11/29/16	
	Updates:	
	Recommendation:	
	File 8- Freitas	

Petitioner: Adrian Cumbry (Pro per – Father)

Petition to Modify Visitation

		ADRIAN CUMBRY, father, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of service at least 15 days before the hearing of the <i>Notice of Hearing</i> on: <ol style="list-style-type: none"> a. Richard Berry Myles, Sr. (guardian/maternal grandfather) 	
		RICHARD BERRY MYLES, SR., maternal grandfather, was appointed guardian on 03/16/2015.		
Cont. from		<p><i>Please see petition for details.</i></p>		
	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			
	FTB Notice			
			Reviewed by: SEF	
			Reviewed on: 11/29/2016	
			Updates:	
			Recommendation:	
			File 10- Cumbry	

Attorney Dale A. De Goede (for Executor Alene Y. Soley)

First and Final Account and Report of Executor and Petition for its Settlement, for Allowance of Compensation for Ordinary Services, and for Final Distribution

DOD: 12/17/2014	ALENE Y. SOLEY , spouse and Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 12/17/2014 – 8/31/2016	
	Accounting - \$838,069.15	
	Beginning POH - \$823,340.[95]	
Cont. from	Ending POH - \$803,604.01 (\$56,215.87 cash)	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory	Executor - waives	
<input checked="" type="checkbox"/> PTC	Executor Costs - \$1,869.06 <i>(filing fee, probate referee, publication, certified copies, timber appraisal; balance due of total \$7,995.92 after offset by a \$6,126.86 Account Receivable from Alene Soley, per Schedule D;)</i>	
<input checked="" type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.	Attorney - \$19,604.63 <i>(statutory)</i>	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Attorney Costs - \$670.00 <i>(filing fee, publication, certified copies)</i>	
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters 041515	Supplement to First and Final Account and Report of Executor, etc., filed 11/29/2016.	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections	Distribution pursuant to Decedent's Will is to:	
<input type="checkbox"/> Video Receipt	ALENE Y. SOLEY as Trustee of the CHARLES AND ALENE SOLEY LIVING TRUST – all Community property consisting of ½ interest in real property in San Luis Obispo County, ½ interest in bank accounts, and ½ interest in personal property at Decedent's residence.	
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting	ALENE Y. SOLEY as Trustee of the CHARLES H. SOLEY SEPARATE PROPERTY LIVING TRUST – all Separate property, most of which as shown on Schedule D with certain exceptions as noted in 11/29/16 Supplement, consisting of money market account, stock, personal property located in Placer County, vehicles, and real property in Placer County.	
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input checked="" type="checkbox"/> FTB Notice		
		Reviewed by: LEG
		Reviewed on: 11/29/16
		Updates: 11/30/16
		Recommendation: SUBMITTED
		File 11- Soley

Petition for Termination of Guardianship

		THURMAN LIGONS, JR., father, is petitioner.	NEEDS/PROBLEMS/COMMENTS:	
		MELVA PALMS, non-relative, was appointed guardian on 12/10/2015.		
Cont. from		<i>Please see petition for details.</i>	1. Need <i>Notice of Hearing</i> . 2. Need proof of service at least 15 days before the hearing of the <i>Notice of Hearing</i> <u>or</u> consents and waivers of notice <u>or</u> declarations of due diligence on: a. Melva Palms (guardian) b. Laquandra Ligons (mother) c. Janice Muhamad (paternal grandmother) d. Nick Kinchen (maternal grandfather) e. Cassandra Miles (maternal grandmother) f. Lanyiaha McCall (sibling) – <i>if 12 years or older</i>	
<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.			
<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: SEF	
			Reviewed on: 11/30/2016	
			Updates:	
			Recommendation:	
			File 12- Ligons	

CI Negrete's report, continued:

Guardian Melva Palms reported she was unaware of Mr. Ligons' petition. She states since he was released from jail he has not visited with minor consistently. She also states minor has experienced bed wetting and negative behaviors after visits with his father. According to Mrs. Palms, minor witnessed a stabbing in which his mother was convicted. Mrs. Palms said minor is experiencing the same behaviors he previously had after visits with his father.

Mrs. Palms said she has allowed the father unsupervised visits and states she did not have a concern with that, but her concern were the behaviors and the father buying his son toy weapons that he should not have.

CI suggested therapy for minor due to his traumatic experience, his mother's incarceration and reestablishing a relationship with his father, to which Mrs. Palms agreed to.

Mrs. Palms is not in agreement with terminating the guardianship, but is willing to work with the father in terminating it in the future.

CI was unable to make contact with the mother due to her incarceration.

CI Negrete recommends the petition to terminate be DENIED. Also, due to the information received regarding the minor's behaviors and bed wetting, it is recommended the guardian seek therapy.

13 Adrian Luis Barragan (CONS/PE) Case No. 15CEPR00561

Attorney Hurlbutt, James P (for Gloria Ann Barragan – Petitioner – Conservator)

First and Final Account and Report and Petition for: 1. Approval of First and Final Account and Report; and 2. Termination of Conservatorship of the Estate

Age: 42	GLORIA ANN BARRAGAN , conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need Amended Order appointed Conservator of the Person only. 2. Need Amended Letters regarding Conservatorship of the Person only.
	Account period: 09/03/2015 – 09/30/2016	
	Accounting - \$508,864.70	
	Beginning POH - \$506,466.94	
	Ending POH - \$0	
Cont. from	Conservator - Waives	
<input type="checkbox"/> Aff.Sub.Wit.	Petition states: Pursuant to the Court's Order in this action and this Court's separate Order in related Fresno County Superior Court Case No. 15CEPR00562, Petitioner has transferred and assigned all assets of the Conservatorship of the Estate to INLAND COUNTIES REGIONAL CENTER, INC., as Trustee of the Master Trust of California Agreement for Adrian Luis Barragan. All transfers of all assets were completed as of July 28, 2016. As set forth in the Summary of Account, there are no assets on hand in the Conservatorship Estate. Petitioner does not anticipate that there will be any assets in the Conservatorship of the Estate in the future. The sole reason for the for the appointment of the Petitioner as Conservator of the Estate was to obtain court authorization and approval of the creation and funding of a pooled special needs trust for the benefit of the Conservatee. That transaction has been completed. Petitioner has made arrangements for the payment of the Attorney Fees and Costs incurred by her attorney of record, James P. Hurlbutt. Accordingly, this Petition does not request any award of attorney fees and/or costs.	
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail w/		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Wherefore, Petitioner requests that the Court issue and Order as follows:
		<ol style="list-style-type: none"> 1. Approving the First Account and Report of the Petitioner in all respects. 2. Terminating the Conservatorship of the Estate of the Conservatee. 3. For such other and further relief as the Court may deem just and proper in the circumstances.
	Reviewed by: LV	
	Reviewed on: 11/30/2016	
	Updates:	
	Recommendation:	
	File 13- Barragan	

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

DOD: 6/16/15		<p>RICHARD D. WHEATLEY, SR., Nephew and Administrator with Full IAEA without bond, is Petitioner.</p> <p>Account period: 6/16/15 – 8/31/16 Accounting: \$375,027.11 Beginning POH: \$367,710.97 Ending POH: \$361,379.38 (cash)</p> <p>Administrator (Statutory): \$10,430.13 Attorney (Statutory): \$10,430.13 Attorney (Extraordinary): \$1,476.50 (for 3.1 attorney hours and 4.1 paralegal hours in connection with the research of trust documents and petition to have assets held in name of trust treated as assets of probate estate)</p> <p>Costs: \$1,868.50 (filing, publication, cert. copies, etc.) Closing: \$2,000.00</p> <p>Distribution pursuant to intestate succession: Richard D. Wheatley, Sr. (Nephew): \$83,902.27 Mary Lee Costa (Niece): \$83,902.27 Melanie England (Great-Niece): \$41,951.16 Bill Tom Ewton (Great-Nephew): \$41,951.16 Judith Cobb (Great-Niece): \$27,967.42 Nancy Cobb (Great-Niece): \$27,967.42 Susan Wilson (Great-Niece): \$27,967.42</p>	NEEDS/PROBLEMS/COMMENTS:
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" 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"/>	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 on: 11/29/16	
		Updates:	
		Recommendation:	
		File 14- Hoosan	

DOD: 02/02/2016		<p>BRADFORD W. HIXSON and BRIAN R. HIXSON, Co-Executors, are petitioners.</p> <p>Accounting is waived</p> <p>I&A - \$3,332,361.10 POH - \$3,332,361.10</p> <p>Co-Executors – Waive</p> <p>Attorney (Statutory) - \$46,406.02</p> <p>Costs (filing fees) - \$440.15</p> <p>Petition states: petitioners have agreed to pay the amount statutory compensation due to Petitioners' attorney from the funds in the estate bank account in the amount of \$20,725.16 leaving a balance owed in the amount of \$25,680.96 to be paid from assets outside of the probate estate.</p> <p>Distribution, pursuant to decedent's Will is to:</p> <p>Bradford W. Hixon – 100% of the dividends from Bank of America, 100% of the cash in lieu of fractional shares from Bank of America Corp, 100% of royalties from Termo Company, 100% interest in various properties in Fresno County, 2010 Chrysler Sedan, 50 % interest in all furniture, furnishings, clothing, jewelry appliances, and all other tangible items of a personal nature.</p> <p>Brian R. Hixon- 100% interest in various real property in Fresno County, 1956 Ford T. Bird; 50 % interest in all furniture, furnishings, clothing, jewelry appliances, and all other tangible items of a personal nature.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input checked="" type="checkbox"/>	PTC			
<input checked="" type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail w/			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters 03/23/2016			
<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 type="checkbox"/>	FTB Notice			
				<p>Reviewed by: LV</p> <p>Reviewed on: 11/30/2016</p> <p>Updates:</p> <p>Recommendation: Submitted</p> <p>File 15- Hixon</p>

Attorney

Gregory J. Roberts (for Petitioner Dbra Lynn Huss, Administrator)

First and Final Account of Administrator and Petition for its Settlement; for Allowance of Fees; for Confirmation of Alternate Distributees and for Final Distribution

DOD: 12/23/2015		DEBRA LYNN HUSS , niece and Administrator is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Account period: 12/23/2015 – 8/31/2016			
Accounting - \$397,400.47			
Beginning POH - \$383,674.50			
Ending POH - \$245,472.10 <i>(all cash)</i>			
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory	Administrator - \$10,918.00 <i>(statutory)</i>	
<input type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.	Attorney - \$10,918.00 <i>(statutory)</i>	
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail W/	Attorney Reimb. - \$1,390.00 <i>(OMNITRACE CORP. research fee)</i>	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.	Costs - \$435.00 <i>(filing fee)</i>	
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen	Closing - \$2,000.00 <i>(expenses of administration; estate federal and state income taxes and accounting fees;)</i>	
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt	Petitioner requests pursuant to Probate Code § 11603(c) that the Court confirm that the four known living nieces and nephew of Decedent are the alternate distributees, in equal shares, of the share of TIMOTHY B. HUSS , nephew, based on the OMNITRACE CORP. Report attached as Exhibit 3, showing unsuccessful efforts and the inability to locate him.	
<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	Distribution pursuant to intestate succession is to:	
<input checked="" type="checkbox"/>	FTB Notice	<ul style="list-style-type: none"> • DEBRA LYNN HUSS – \$54,952.77 cash; • DANNY LEROY HUSS – \$54,952.77 cash; • KATHLEEN M. RUPERT – \$54,952.77 cash; • CHERYL LYNN HUSS – \$54,952.77 cash. 	
			Reviewed by: LEG
			Reviewed on: 11/30/16
			Updates:
			Recommendation:
			File 16- Knight

Attorney Kim M. Herold (for Petitioner Bernadette Marez, mother)

Petition for Instructions

		<p>H. F. RICK LEAS of CENTRAL VALLEY FIDUCIARY SERVICES, Trustee, is Petitioner.</p> <p align="center">~Please see Petition for details~</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Page 18 is the related <i>Petition for Instructions</i> for this Beneficiary's sibling.</p> <p>1. Prior to authorizing the Trustee to make the requested investments, the Court may require specific and detailed information, such as investment companies, offerings, and rates, regarding the anticipated investment choices: California tax exempt bond funds, high grade bond funds, certificates of deposit, and Blue Chip income equity mutual funds. Further, Court may require Trustee to provide the Court with a detailed plan of anticipated investments, including the sum of money to be invested in each specific type of investment.</p> <p align="center">~Please see additional page~</p>																																																																				
<p>Cont. from</p> <table border="1"> <tr><td><input type="checkbox"/></td><td>Aff.Sub.Wit.</td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Verified</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Inventory</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>PTC</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Not.Cred.</td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Notice of Hrg</td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Aff.Mail</td><td>W/</td></tr> <tr><td><input type="checkbox"/></td><td>Aff.Pub.</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Sp.Ntc.</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Pers.Serv.</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Conf. Screen</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Letters</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Duties/Supp</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Objections</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Video Receipt</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>CI Report</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>9202</td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Order</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Aff. Posting</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Status Rpt</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>UCCJEA</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Citation</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>FTB Notice</td><td></td></tr> </table>				<input type="checkbox"/>	Aff.Sub.Wit.		<input checked="" type="checkbox"/>	Verified		<input type="checkbox"/>	Inventory		<input type="checkbox"/>	PTC		<input type="checkbox"/>	Not.Cred.		<input checked="" type="checkbox"/>	Notice of Hrg		<input checked="" type="checkbox"/>	Aff.Mail	W/	<input type="checkbox"/>	Aff.Pub.		<input type="checkbox"/>	Sp.Ntc.		<input type="checkbox"/>	Pers.Serv.		<input type="checkbox"/>	Conf. Screen		<input type="checkbox"/>	Letters		<input type="checkbox"/>	Duties/Supp		<input type="checkbox"/>	Objections		<input type="checkbox"/>	Video Receipt		<input type="checkbox"/>	CI Report		<input type="checkbox"/>	9202		<input checked="" type="checkbox"/>	Order		<input type="checkbox"/>	Aff. Posting		<input type="checkbox"/>	Status Rpt		<input type="checkbox"/>	UCCJEA		<input type="checkbox"/>	Citation		<input type="checkbox"/>	FTB Notice
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NEEDS/PROBLEMS/COMMENTS, continued:

2. *Declaration of Kim Marie Herold in Support of Attorney's Fees Re Petition for Instructions* filed 10/19/2016 includes anticipated time of **1.0** hour listed as pending for estimated time to attend the hearing on the *Petition for Instructions*, at an attorney hourly rate of **\$395.00**. Court may disallow entirely the request for anticipated attorney time. Alternatively, Court may disallow as duplicative one of the charges of **\$395.00** that is requested for both the instant petition and the companion petition for the sibling, which would result in a total of **\$790.00** paid for anticipated time for attendance at the same hearing. Court may require the sum of **\$1,887.50** requested for attorney fees be reduced by **\$197.50** ($\$395.00 \div 2$), in order to eliminate the duplicative charge, for a total allowable fee of **\$1,690.00** for each companion case.

Note Re: Purchase of Real Property: Court may require the Trustee to inform the Court, via petition for proposed purchase of real property, regarding the exact terms of purchase that the Trustee anticipates would be agreed upon, prior to actually entering into such agreement for purchase.

Attorney Kim M. Herold (for Petitioner Bernadette Marez, mother)

Petition for Instructions

		<p>H. F. RICK LEAS of CENTRAL VALLEY FIDUCIARY SERVICES, Trustee, is Petitioner.</p> <p align="center">~Please see Petition for details~</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Page 17</u> is the related <i>Petition for Instructions</i> for this Beneficiary's sibling.</p> <p>3. Prior to authorizing the Trustee to make the requested investments, the Court may require specific and detailed information, such as investment companies, offerings, and rates, regarding the anticipated investment choices: California tax exempt bond funds, high grade bond funds, certificates of deposit, and Blue Chip income equity mutual funds. Further, Court may require Trustee to provide the Court with a detailed plan of anticipated investments, including the sum of money to be invested in each specific type of investment.</p> <p align="center">~Please see additional page~</p>																																																																				
<p>Cont. from</p> <table border="1"> <tr><td><input type="checkbox"/></td><td>Aff.Sub.Wit.</td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Verified</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Inventory</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>PTC</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Not.Cred.</td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Notice of Hrg</td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Aff.Mail</td><td>W/</td></tr> <tr><td><input type="checkbox"/></td><td>Aff.Pub.</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Sp.Ntc.</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Pers.Serv.</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Conf. Screen</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Letters</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Duties/Supp</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Objections</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Video Receipt</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>CI Report</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>9202</td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Order</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Aff. Posting</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Status Rpt</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>UCCJEA</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Citation</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>FTB Notice</td><td></td></tr> </table>				<input type="checkbox"/>	Aff.Sub.Wit.		<input checked="" type="checkbox"/>	Verified		<input type="checkbox"/>	Inventory		<input type="checkbox"/>	PTC		<input type="checkbox"/>	Not.Cred.		<input checked="" type="checkbox"/>	Notice of Hrg		<input checked="" type="checkbox"/>	Aff.Mail	W/	<input type="checkbox"/>	Aff.Pub.		<input type="checkbox"/>	Sp.Ntc.		<input type="checkbox"/>	Pers.Serv.		<input type="checkbox"/>	Conf. Screen		<input type="checkbox"/>	Letters		<input type="checkbox"/>	Duties/Supp		<input type="checkbox"/>	Objections		<input type="checkbox"/>	Video Receipt		<input type="checkbox"/>	CI Report		<input type="checkbox"/>	9202		<input checked="" type="checkbox"/>	Order		<input type="checkbox"/>	Aff. Posting		<input type="checkbox"/>	Status Rpt		<input type="checkbox"/>	UCCJEA		<input type="checkbox"/>	Citation		<input type="checkbox"/>	FTB Notice
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NEEDS/PROBLEMS/COMMENTS, continued:

4. Declaration of Kim Marie Herold in Support of Attorney's Fees Re Petition for Instructions filed 10/19/2016 includes anticipated time of **1.0** hour listed as pending for estimated time to attend the hearing on the *Petition for Instructions*, at an attorney hourly rate of **\$395.00**. Court may disallow entirely the request for anticipated attorney time. Alternatively, Court may disallow as duplicative one of the charges of **\$395.00** that is requested for both the instant petition and the companion petition for the sibling, which would result in a total of **\$790.00** paid for anticipated time for attendance at the same hearing. Court may require the sum of **\$1,887.50** requested for attorney fees be reduced by **\$197.50** ($\$395.00 \div 2$), in order to eliminate the duplicative charge, for a total allowable fee of **\$1,690.00** for each companion case.

Note Re: Purchase of Real Property: Court may require the Trustee to inform the Court, via petition for proposed purchase of real property, regarding the exact terms of purchase that the Trustee anticipates would be agreed upon, prior to actually entering into such agreement for purchase.

First Amended Spousal Property Petition

DOD: 3/2/2016	ALEC BOLDEROFF , surviving spouse, is petitioner	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need proof of service of <i>Notice of Hearing</i> on decedent's intestate heirs pursuant to Prob C§13655(a)(2) as follows: <ol style="list-style-type: none"> a. Jack Klistoff (brother) 2. Item 9 of petition lists Alex Klistoff as a predeceased brother of decedent. Need date of death pursuant to Local Rule 7.1.1D. 3. Petitioner is requesting the Court's permission to access decedent's safe deposit box and the right to remove any and all contents held in the name of Stella Bolderoff. There appears to be no authority for this type of request in a spousal property summary procedure. 4. Need new order. Petitioner requests the Court pass ½ of decedent's separate property interest to petitioner, but does not dispose of decedent's remaining ½ interest that appears to pass to decedent's intestate heirs. Therefore, it appears item 8 of the order should be checked and include an attachment 8 listing all property that <i>is not</i> determined to be property passing to or confirmed belonging to the surviving spouse that shall be subject to administration in the estate of decedent. (Please see Prob C§13656(b))
	No other proceedings	
	Decedent died intestate	
Cont. from	Petitioner states decedent and petitioner were married on 6/14/1964 and at the time of decedent's death on 3/2/2016, had been married 51 years. Decedent and petitioner had one child who died on 9/5/1994. They had no other children. The property described in the petition listed as separate property was property received by decedent from inheritance. Pursuant to the laws of intestate succession, petitioner is entitled to an undivided one-half (1/2) interest in the separate property.	
<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.	Since the date of their marriage, decedent and petitioner have accumulated all their property from marital earnings of the parties. No legal proceedings were ever instituted to terminate the marriage or to determine the rights of the parties to their community property nor did the parties ever separate.	
<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	Petitioner requests court determination that ½ of decedent's separate property interest in real property located in Kerman and 50% community property interest in checking accounts, savings accounts, CDs, annuities, etc., <i>passes</i> to him. He further requests court confirmation that petitioner's 50% community property interest checking and savings accounts, CDs, annuities, etc., <i>belongs</i> to him.	
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order	x	
<input type="checkbox"/> Aff. Posting	In addition, petitioner requests access to decedent's safe deposit boxes and the right to remove any and all contents held in the name of Stella Bolderoff.	
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: SEF
		Reviewed on: 12/1/2016
		Updates:
		Recommendation:
		File 19- Bolderoff

Petitioner: Lois Jean Robinson (Pro per – Maternal great-grandmother)

Petition for Appointment of Guardian of the Person

		<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS:
		LOIS JEAN ROBINSON , maternal great-grandmother, is petitioner.	
		Court Investigator report filed 10/17/2016.	<ol style="list-style-type: none"> 1. Need proof of personal service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the petition <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence for: <ol style="list-style-type: none"> a. Donovan McLaughlin (father) – <i>unless the Court excuses notice per declaration of due diligence filed 11/17/16</i> 2. Need proof of service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the petition <u>or</u> consents and waivers of notice <u>or</u> declarations of due diligence for: <ol style="list-style-type: none"> a. Quincy McLaughlin (paternal grandfather) – <i>unless the Court excuses notice per declaration of due diligence filed 11/17/16</i> b. Maternal grandfather (unknown) 3. Item 3a of UCCJEA does not include minor's residence information for the past five years. Need minor's residence from 2011 through 2014.
Cont. from 102416		Please see petition for details.	
<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		
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<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: SEF
			Reviewed on: 11/29/2016
			Updates: 12/1/2016
			Recommendation:
			File 20- McLaughlin

Petition for Probate of Will and for Letters Testamentary

DOD: 8/12/2016		POWELL H. LEMONS , named executor without bond, is petitioner. Full IAEA – need Will dated 6/16/2016 Residence: Fresno Publication: need Estimated value of Estate: Personal property \$ 25,000.00 Annual gross income: \$ 0.00 Real property: \$ 168,860.00 Total: \$ 193,860.00 Probate Referee: Steven Diebert	NEEDS/PROBLEMS/COMMENTS: 1. Items 5a(3),(4) of petition are incomplete re: if decedent was survived by a registered domestic partner. 2. Items 5a(7),(8) of petition are incomplete re: if decedent was survived by issue of a predeceased child. 3. Item 6 of petition is incomplete. Petition indicates decedent is not survived by a spouse or issue; therefore, item 6 must be completed. 4. Item 8 of petition does not list all persons mentioned in decedent's will, as required: a. Jonathon Von Ah (named alternate executor) b. Noel Daniels (named alternate executor) 5. Need proof of service of <i>Notice of Petition to Administer Estate</i> on the following persons entitled to notice pursuant to Prob C§ 8110(b): a. Jonathon Von Ah (named alternate executor) b. Noel Daniels (named alternate executor) 6. Need affidavit of publication pursuant to Prob C§ 8124. 7. Need original will pursuant to Prob C§ 8200 et seq. 8. Need <i>Letters</i> . Please see additional page.
Cont. from 102016			
<input checked="" type="checkbox"/>	Aff.Sub.Wit. s/p		
<input checked="" type="checkbox"/>	Verified		
	Inventory		
	PTC		
	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Petn Admn		
<input checked="" type="checkbox"/>	Aff.Mail w/		
	Aff.Pub. x		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters x		
<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: SEF	
		Reviewed on: 11/29/2016	
		Updates:	
		Recommendation:	
		File 21- Hughes	

NEEDS/PROBLEMS/COMMENTS, *continued*:

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

- **Tuesday, May 9, 2017** at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.
- **Tuesday, February 6, 2018** at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.

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.

22 Donya Nightingale (GUARD/P)

Case No. 16CEPR01020

Attorney: Julie A. Hicks (for Margaret George - Petitioner)

Objector: Vivian Dolores Brannan (Pro per – Paternal grandmother)

Petition for Appointment of Guardian of the Person

		<u>NO TEMPORARY - NOT REQUESTED</u>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Petitioner:</p> <ol style="list-style-type: none"> 1. Need proof of <i>personal</i> service with at least 15 days notice of <i>Notice of Hearing</i> with copy of petition <u>or</u> consents and waivers of notice <u>or</u> declarations of due diligence for: <ol style="list-style-type: none"> a. Warren Garrett Brannan (father) b. Heather Blowers (mother) 2. Need proof of service with at least 15 days notice of <i>Notice of Hearing</i> with copy of petition <u>or</u> consent and waivers of notice <u>or</u> declaration of due diligence for: <ol style="list-style-type: none"> a. Warren Brannan (paternal grandfather) – <i>unless the Court excuses notice per item 10 of petition</i> <p>Objector:</p> <ol style="list-style-type: none"> 1. Objections are not verified. 2. Need proof of service of objections on petitioner.
		MARGARET GEORGE , maternal grandmother, is petitioner.	
		Court Investigator report filed 11/22/2016.	
		Objections of Vivian Dolores Brannan (paternal grandmother) filed 11/28/2016.	
		<i>Please see petition for details.</i>	
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w/	
	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: SEF	
		Reviewed on: 11/30/2016	
		Updates: 12/1/2016	
		Recommendation:	
		File 22- Nightingale	

Petition for Appointment of Guardian of the Person

		<u>NO TEMPORARY – NOT REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS:
		DARLENE SCOTT , maternal great aunt, is petitioner	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	<i>Please see petition for details.</i>	
<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/	
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<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: SEF
			Reviewed on: 11/30/2016
			Updates:
			Recommendation:
			File 23- Cates

24 Jaden Arroyo (GUARD/P) Case No. 16CEPR01022

Petitioner Caldera, Emerita (Pro Per – Maternal Grandmother)

Petition for Appointment of Guardian of the Person

Age: 1 year	NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
	EMERITA CALDERA , maternal grandmother, is petitioner.	<p>1. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice for:</p> <ul style="list-style-type: none"> Albert Cantero (Father) – Unless the Court dispenses with notice. <p>Note: Petition did not list the name of the father however according to the Court Investigator's report filed 11/18/2016, the petitioner stated the father's name is Albert Cantero who last resided in Los Angeles.</p>
	<u>Please see petition for details</u>	
Cont. from		<p>2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:</p> <ul style="list-style-type: none"> Paternal Grandparents (Not Listed) – Unless the Court dispenses with notice. <p>Note: Declaration of Due Diligence filed 11/09/2016.</p> <ul style="list-style-type: none"> Pablo Arroyo (Maternal Grandfather)
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail	x	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
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<input checked="" type="checkbox"/> Conf. Screen		
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<input checked="" type="checkbox"/> Duties/Supp		
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<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LV
		Reviewed on: 12/01/2016
		Updates:
		Recommendation:
		File 24- Arroyo

Spousal or Domestic Partner Property Petition

DOD: 5/1/2016		JUAN DE DIOS INIGUEZ, SR. , surviving spouse, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		No other proceedings.	
Cont. from		Decedent died intestate.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Petitioner states he is the surviving spouse of the Decedent who died intestate, and the property listed in the Petition was acquired by Decedent and the Petitioner with community property funds while they were married and domiciled in the state of California.	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	Petitioner requests Court determination that ½ interest in real property located on Polk Avenue in Fresno passes to him, and Court confirmation that ½ interest in the real property located on Polk Avenue in Fresno belongs to him.	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" 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: LEG
			Reviewed on: 11/30/16
			Updates:
			Recommendation: SUBMITTED
			File 25- Iniguez

Petition for Appointment of Conservator of the Person

		<u>NO TEMPOARY;</u>	NEEDS/PROBLEMS/COMMENTS:
		<u>Denied and dismissed on 11/1/2016</u>	
		<p>NORA COFFMAN, mother, is petitioner and requests appointment as conservator of the person with medical consent powers pursuant to Prob C§2355.</p> <p style="text-align: center;"><i>Please see petition for details.</i></p>	<p>Court Investigator report filed on 10/28/16 states petitioner indicated she no longer wished to pursue her [temporary and general] petitions.</p> <p>If petitioner wishes to pursue the conservatorship, the following issues exist:</p> <p>Petitioner:</p> <ol style="list-style-type: none"> 1. Need <i>Citation</i>. 2. Need proof of personal service with at least 15 days notice of Citation with a copy of the petition on proposed conservatee. 3. Petitioner's list of relatives at # 11 does not specify each person's relationship to the proposed conservatee, and it is unclear whether this list includes all relatives within the 2nd degree, which includes parents, grandparents, siblings, children and grandchildren. If there are additional relatives, need notice per Prob C§2250(e). <p style="text-align: center;"><i>Please see additional page.</i></p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
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<input checked="" type="checkbox"/>	Notice of Hrg		
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<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 type="checkbox"/>	Order	x	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation	x	
<input type="checkbox"/>	FTB Notice		
			Reviewed by: SEF
			Reviewed on: 11/30/2016
			Updates:
			Recommendation:
			File 26- Coffman

NEEDS/PROBLEMS/COMMENTS, continued:

4. *Capacity Declaration* filed 10/19/2016 is incomplete at items 1 and 2 re: name and office address of physician.
5. Need Video Viewing Receipt for petitioner.

Court Investigator to provide:

- Investigation report
- Advisement of rights
- Recommendation re: voting rights

Petitioner Celia Searl (Pro Per, mother)
 Attorney Lisa Horton (Court-appointed for Conservatee)

Petition for Appointment of Temporary Conservator of the Person

		<u>GENERAL HEARING SET FOR 1/4/2017</u>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator Advised Rights on 11/28/2016.</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing and proof of five (5) court days' notice by personal service of the Notice of Hearing and a copy of the Petition for Appointment of Temporary Conservator for: <ul style="list-style-type: none"> • Amanda Dessiree Searl, proposed Conservatee. 2. Need proof of five (5) court days service by mail of the Notice of Hearing and a copy of the Petition for Appointment of Temporary Conservator for: <ul style="list-style-type: none"> • Brian Keith Searl, father of proposed Conservatee; • Dessiree Searl, paternal grandmother; • Maternal grandparents; • Katherine Nacido, sister.
		<p>CELIA SEARL, mother, is Petitioner and requests appointment as Conservator of the Person, and requests authority to change the proposed Conservatee's residence to bring her back to Petitioner's home.</p> <p>Petitioner states the proposed Conservatee has moderate developmental delay and she ran away from the family on 11/2/2016, and is living with her boyfriend, who is also diagnosed with developmental delay. Petitioner states the proposed Conservatee and her boyfriend are living with the grandmother of her boyfriend and proposed Conservatee is refusing to return home to Petitioner. Petitioner states she has great concern as she fears the proposed Conservatee is not taking her prescribed medications to control her to control her hormonal imbalance, aggression, violent tendencies, and excessive anger. Petitioner states proposed Conservatee has a history of sexual promiscuity and Petitioner is confident the proposed Conservatee and her boyfriend are sexually active and that the proposed Conservatee could become pregnant any day now with a child she is unable to properly care for.</p> <p>Petitioner requests she be authorized to bring the proposed Conservatee back to Petitioner's home because the proposed Conservatee is staying with her special needs boyfriend and she may not be getting her necessary medication. Petitioner states the proposed Conservatee is refusing to cooperate with Petitioner.</p> <p>Court Investigator Report was filed on 11/29/2016 states the temporary conservatorship does not appear to be necessary, and recommends the petition be DENIED.</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	X	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	X	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: LEG
Reviewed on: 11/30/16
Updates:
Recommendation:
File 27- Searl

Dept. 303, 9:00 a.m. Monday, December 5, 2016

Petition for Appointment of Temporary Guardian of the Person

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 11/28/16:</u> Continued for proper service. 1. Need Notice of Hearing. 2. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) <u>or</u> consent and waiver of notice on: - Alexis Higuera (Minor) - Alexander Higuera (Father)	
Cont. from 112816				
	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: skc	
			Reviewed on: 11/29/16	
			Updates:	
			Recommendation:	
			File 28- Higuera	