



## 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.

**Second & Final Account and Report of Conservator;  
 Petition for Allowance of Compensation to Conservator and Attorney**

<b>DOD: 05/28/2016</b>	<b>PUBLIC GUARDIAN</b> , Conservator, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Account period: 02/08/2010 – 05/28/2016	
	Accounting - <b>\$10,661.10</b>	
<b>Cont. from</b>	Beginning POH - <b>\$1,802.65</b>	
<b>Aff.Sub.Wit.</b>	Ending POH - <b>\$1,068.37</b>	
<input checked="" type="checkbox"/> <b>Verified</b>	Subsequent Account Period: 05/29/2016 - 09/16/2016	
<b>Inventory</b>		
<b>PTC</b>	Accounting - <b>\$1,639.59</b>	
<b>Not.Cred.</b>	Beginning POH - <b>\$1,068.37</b>	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Ending POH - <b>\$342.08</b>	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> w/	Conservator - <b>\$2,984.80</b> (22.32 Deputy hours @ \$96/hr and 11.08 Staff hours @ \$76/hr)	
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>	Attorney - <b>\$1,250.00</b> (less than Local Rule)	
<b>Pers.Serv.</b>	Petitioner request that due to the insufficiency of the estate to pay the fees and commissions that a lien be imposed upon the estate for any unpaid balances of the authorized fees and commissions.	
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>	<b>Petitioner prays for an Order:</b>	
<b>9202</b>	1. The Court find that the Conservatorship of the person and estate of the conservatee terminated on May 28, 2016, the conservatee's date of death;	
<input checked="" type="checkbox"/> <b>Order</b>	2. Approving, allowing and settling the second account.	
<b>Aff. Posting</b>	3. Authorizing the conservator and attorney fees and commissions	
<b>Status Rpt</b>	4. Authorize petitioner to impose a lien on the estate for any unpaid balances of authorized fees and commissions.	
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed on:</b> 12/02/2016
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 1- Johnson</b>

**2 Julissa Contreras, Arianna Contreras, Ramon Contreras,  
Danny Cabrera, and Angel Toby Rodriguez, Jr. (GUARD/P)**

**Case No. 13CEPR00234**

Petitioner: Maria L. Rodriguez (Pro per - Paternal grandmother)

Petitioner: Alejandro Gandara (Pro per - Non-relative)

**Petition for Appointment of Guardian of the Person**

Age: 5 years	<b><u>TEMPORARY DENIED ON 10/19/2016</u></b>		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><i>Petition is as to Angel Toby Rodriguez, Jr. only.</i></b> Patricia Martinez (maternal grandmother) and Candice Gomez (maternal aunt) were appointed co-guardians of minor's four half-siblings on 5/28/2013.</p> <p><b>Minute Order of 10/19/2016:</b> Stephanie Cabrera, mother, does not want additional time to review the paper work, and orally objects to the temporary in court. The Court orders that written objections must be filed and properly served by 11/21/2016 for the general hearing on 12/06/2016. For the record, Angel T. Alvarez and Angel T. Rodriguez are the same individual.</p> <p><b>For Objector:</b></p> <ol style="list-style-type: none"> <li>1. Need proof of service of Objection filed 11/18/2016 on Maria Rodriguez and Alejandro Gandara.</li> </ol>
	<p><b>MARIA RODRUIGEZ and ALEJANDRO GANDARA</b>, paternal grandmother and her fiancé, are petitioners.</p> <p><b><u>Please see petition for details</u></b></p>		
Cont. from			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail			
Aff.Pub.			
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✓ Duties/Supp			
Objections			
Video Receipt			
✓ CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
			Reviewed by: LV
			Reviewed on: 12/01/2016
			Updates:
			Recommendation:
			File 2- Rodriguez

First Account and Report of Conservator of Estate and Petition for Settlement Thereof, for Authorization Of Transaction With Conservatee, Distribution Of Personal Property, Allowance Of Attorney Fees and Reimbursement

		<p><b>JILL MCCOOL</b>, Daughter and Conservator with bond of \$48,080.00, is Petitioner.</p> <p><b>Account period: 6/16/15 – 7/31/16</b>          Accounting: \$324,216.81          Beginning POH: \$264,681.52          Ending POH: \$291,066.35          (\$9,317.85 cash plus real property, vehicles, investment account, receivable from conservator, life insurance policy)</p> <p>Conservator: Not requested</p> <p>Attorney: \$8,018.50 (for attorney hours @ \$285-295/hr and paralegal hours @ \$105-115/hr from 11/13/14 – present itemized at Exhibit B)</p> <p>Costs: \$657.30 (Appraisal, filing, e-filing fees)</p> <p><b>Petitioner states</b> the Conservatee desires to continue to reside in his home, which is subject to a reverse mortgage that if he were to no longer reside in the property the lender could terminate the reverse mortgage and therefore some income. Conservatee cannot live in his residence alone. Petitioner has used estate funds to maintain the home in good repair and has moved in with her family to reside with and care for the Conservatee, which is in his best interest. Petitioner has not entered into a lease agreement but has advanced personal funds to pay utilities and other household expenses and then reimbursed herself for a portion of the expenses. Petitioner requests Court approval that her and her family's care of the Conservatee and maintaining his residence and reverse mortgage income be considered adequate consideration such that no lease agreement or rent be required and that Petitioner may continue to share utilities and household expenses as during this first account.</p> <p style="text-align: center;"><b><u>SEE PAGE 2</u></b></p>	<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <p>Continued from 11/7/16</p> <p style="text-align: center;"><b><u>SEE ADDITIONAL PAGES</u></b></p> <p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 12/1/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b> File 4- Britton</p>
<b>Cont. from 110716</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
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<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>	6/16/15	
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>2620(c)</b>	X	
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
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<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		

**Page 2 - Petitioner states** the Conservatee owns two trucks, a 1995 GMC Sonoma and a 2001 Ford F150. The GMC was physically given by the Conservatee to his son prior to the health event making conservatorship necessary; however, the Conservatee did not formally transfer the title. The vehicle, appraised for \$1,250, is a depreciating asset that depletes estate funds for insurance and maintenance, and the Conservatee is physically unable to drive, and if he did, Petitioner intends to retain the F150 for that purpose. Petitioner and her brother agree that it was his intention to give the GMC to Robert Britton, Jr., and Petitioner requests Court approval of such distribution.

**Petitioner prays for an order:**

1. Approving, allowing, and settling the First Account and Report of the conservatorship as filed;
2. Approving Petitioner and her family residing in the Conservatee's residence as in the best interest of the Conservatee;
3. Authorizing Petitioner and her family to continue residing in the residence for shared utilities and household expenses;
4. Authorizing and directing Petitioner to distribute the GMC Sonoma to Robert Britton, Jr., for no consideration;
5. Authorizing and directing to distribute to Lawvex, Inc., the amount of \$8,018.50 in fees and \$657.30 in reimbursable costs; and
6. Such further orders as the Court considers proper.

**NEEDS/PROBLEMS/COMMENTS:**

**1. Prior notes requested account statements pursuant to Probate Code §2620(c)(2).**

**Declaration filed 11/28/16** provides statements from August 2015-August 2016; however, the statement showing the balance preceding appointment is not included. Need initial statement (June-July 2015).

**Note:** Account statements should be filed separately, confidential, rather than attached to a declaration.

**2. Prior notes requested clarification re \$967.74 in finance charges and late charges on various credit cards pursuant to Probate Code §1064(a)(2).**

**Declaration filed 11/28/16 states** the Conservatee resided at Golden Living until January 2015. Credit cards were used each month for his stay and care. The finance charges were in the process of being paid off. There were four late fees due to the institutions due to receiving checks late in the mail; therefore, Petitioner has started calling with payments to avoid late charges.

**Given this information, need further clarification:** Are there balances remaining on these cards? The Disbursements Schedule reflects only finance charges and late charges. Are the Conservatee's credit cards still being used? If so, for what? Need schedule of liabilities pursuant to Probate Code §1063(g) for this and all future accounts.

**SEE ADDITIONAL PAGES**

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

3. **Prior notes requested clarification** re the loan against life insurance policy for \$27,182.41 reflected on Schedule E POH pursuant to Probate Code § 1064(a)(2). (Petitioner indicates at Schedule B, Additional Property Received, a life insurance policy received 5/20/16, initial premium \$10,000, account value at Anniversary Date (date not stated) of \$52,391.56, with a loan against the policy with interest accruing at 3.80% per annum of \$27,182.41, total value therefore \$25,209.15. When was the policy obtained? When was the loan obtained? Are payments being made on the loan? There do not appear to be corresponding line items as receipts or disbursements.)

**Declaration filed 11/28/16 states** a loan from the conservatee's life insurance policy was issued on 5/20/85. There are no payments being made on that loan, nor does the Conservatee receive any funds from that policy. Attempts to contact Delaware Life Insurance and obtain paperwork pertaining to the policy have been met with resistance. Currently, Petitioner and her attorney are trying to obtain the loan and policy information.

**Given this information**, need further clarification re this liability on schedule pursuant to § 1063(g) as noted above.

4. **Prior notes requested clarification** re Receivable from Conservator for \$1,945.92 listed as an asset on Schedule E POH pursuant to Probate Code § 1064(a)(2). (There do not appear to be any disbursements to Petitioner for this amount during this account period. Was this a loan prior to conservatorship? What is Petitioner's plan to pay it back?)

**Declaration filed 11/28/16 states** because Petitioner and her family reside with the Conservatee, some bills are paid from the conservatee's account and some are paid by Petitioner. At the end of every month, Petitioner would equal bills out by paying each bank account from the other. Petitioner believed it was coming out even, but after the summary of account was completed, she saw that it was not; therefore, on 11/15/16, she deposited \$1,945.92 into Conservatee's account to fulfill that debt.

5. **The Court may disallow the \$23.35 e-filing costs as a cost of doing business.**

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

- **Monday, October 1, 2018**

Petitioner Patricia Melom (Pro Per, Administrator)

**First and Final Account and Report of Personal Representative, Petition for Allowance of Statutory Fees and for Final Distribution**

<b>DOD: 10/13/2014</b>	<b>PATRICIA A. MELOM</b> , niece and Successor Administrator appointed on 9/29/2015, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Need amended account based upon, but not limited to, the following defects:</b></p> <ol style="list-style-type: none"> <li><i>Petition</i> states the account period for this <i>First and Final Account</i> covers <b>10/13/2014 through 11/1/2016</b>. However, Petitioner <b>PATRICIA A. MELOM</b> was not appointed administrator until <b>9/29/2015</b>, a date subsequent to the 10/13/2014 beginning of this account period. Additionally, the <i>First and Final Account and Report of Former Administrator</i> filed 11/18/2015 by the <b>PUBLIC ADMINISTRATOR</b> reported the account period as <b>11/5/2014 through 11/5/2015</b>, such that Petitioner's account period overlaps that of the <b>PUBLIC ADMINISTRATOR</b>. <p>~Please see additional page~</p> </li></ol>
<b>Cont. from 110116</b>	<p><b>Account period: 10/13/2014 – 11/1/2016</b></p> <p>Accounting - <b>[\$1,041,289.84?]</b>                  Beginning POH - <b>[\$1,041,289.84?]</b>                  Ending POH - <b>\$ 785,994.93?</b>  <i>(total cash unclear)</i></p> <p>Administrator - <b>\$9,600.00</b>  <i>(calculation basis unclear)</i></p> <p>Administrator Reimb.- <b>\$1,682.96</b>  <i>(for lost wages from work to attend hearings)</i></p> <p>Costs - <b>\$460.00</b>  <i>(filing fee; certified copies;)</i></p> <p><b>Distribution pursuant to intestate succession is to:</b></p> <p><b>PAULETTE MELOM</b> – <i>[need proper distribution]</i></p> <p><b>JEANETTE GULBRONSEN</b> – <i>[need proper distribution]</i></p> <p><b>PATRICIA A. MELOM</b> – <i>[need proper distribution]</i></p>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
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<input checked="" type="checkbox"/> <b>Inventory</b>		
<input checked="" type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b> by PA		
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<input type="checkbox"/> <b>Aff.Pub.</b>		
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<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b> 100915		
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<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b> by PA		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> LEG
		<b>Reviewed on:</b> 12/1/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 5 – Woof</b>

## 5 First Additional Page, Beatrice Marie Woof (Estate) Case No. 15CEPR00094

### NEEDS/PROBLEMS/COMMENTS, continued:

2. *Final Inventory and Appraisal* filed 11/1/2016 is signed by Petitioner **PATRICIA MELOM** at the space intended for the assigned Probate Referee, **STEVEN DIEBERT**. Further, there are assets inventoried and appraised both on the *Supplemental Inventory and Appraisal* filed 2/29/2016, and on the *Final Inventory and Appraisal* filed 11/1/2016, such as real property, financial management accounts, and stocks which are characterized by fluctuating values requiring appraisal by the Probate Referee, **STEVEN DIEBERT**, pursuant to Probate Code §§ 8901 (d) and 8902. Need revised *Final Inventory and Appraisal* containing an inventory and appraisal of the entirety of the assets of the estate from **STEVEN DIEBERT**.
3. *First and Final Account and Report of Former Administrator* filed 11/18/2015 by the **PUBLIC ADMINISTRATOR** shows the ending Property on Hand as **\$92,715.18**, of which **\$38,515.18** was cash. *Summary of Account* in support of the instant *First and Final Account* filed by Petitioner shows the beginning property on hand as **\$1,041,289.84**, rather than **\$92,715.18** as it should be for this accounting.
4. Petitioner has only been granted limited IAEA authority. The Administrator having only Limited IAEA authority rather than Full authority under IAEA did not prevent her from taking actions with assets she had later taken possession of as Successor Administrator. It appears the Successor Administrator took actions with un-blocked personal property assets of the estate, as the only blocked funds in the estate were those ordered by the Court on 9/20/2015 to be blocked at the transfer of assets from the **PUBLIC ADMINISTRATOR** to the Petitioner as Successor Administrator. Petitioner marshalled, possessed, and improperly distributed additional estate assets subsequent to her appointment and the Court's initial order to block all funds. It appears from the account schedules that the Petitioner has already distributed property of the estate (apparently in the form of shares of stock or financial or securities accounts) to herself and the two other heirs in the sum of **\$241,338.91**. Distributions should not have been made prior to an order allowing distribution. From the prohibited preliminary distributions as shown in *Schedule F, Distributions to Beneficiaries*, it appears that Petitioner has not demonstrated that no loss or injury has been suffered by the estate, creditors, or any interested persons per Probate Code § 10520.
5. **SAINT AGNES MEDICAL CENTER** filed a *Creditor's Claim* in the sum of **\$2,432.00** on 4/13/2015 for services rendered to Decedent from 6/11/2014 to 10/9/2014 (Decedent died on 10/13/2014). Paragraph 3 of the Petitioner's *First and Final Account* states "the Creditor's Claim from Grant Mercantile for St. Agnes Hospital in the amount of **\$2,043.12** [sic] was resolved without payment from the estate." *First and Final Account and Report of Former Administrator* filed 11/18/2015 by the **PUBLIC ADMINISTRATOR** states in paragraph 6 that "a Creditor's Claim was filed against the estate by **SAINT AGNES MEDICAL CENTER** on 4/13/2015 in the amount of **\$2,432.00**. The successor administrator will have to act on that claim." [Emphasis added.] Petitioner as Successor Administrator appointed on 9/29/2015 has a duty to act upon the Creditor's Claim, and the Petitioner does not explain the statement "was resolved without payment from the estate" regarding this Creditor's Claim. Need additional information regarding the Creditor's Claim and/or satisfaction and release signed by **SAINT AGNES MEDICAL CENTER**.

~Please see additional page~

## 5 Second Additional Page, Beatrice Marie Woof (Estate) Case No. 15CEPR00094

### NEEDS/PROBLEMS/COMMENTS, continued:

6. Calculation basis of the Petitioner's request for **\$9,600.00** as statutory compensation is unclear.
7. Petitioner requests reimbursement of **\$1,682.96** for lost wages from work to attend hearings, without providing any evidence or documentation to the Court for such wage loss.
8. *Schedule D, Disbursements*, shows Petitioner paid herself **\$745.18** from the estate as reimbursement for expenses, prior to the Court authorizing such payment.
9. Petitioner requests reimbursement of the following costs of **\$41.79** which are prohibited under Local Rule 7.17:
  - Parking fees of **\$18.50**. Local Rule 7.17(B)(5);
  - Postage fees of **\$23.29**. Local Rule 7.17(C)(1).
10. Proposed distribution stated in Paragraph 3 does not propose to make distribution as required by Local Rule 7.6.1(A), which provides that 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. Monetary distributions must be stated in dollars, and not as a percentage of the estate. Proposed distribution appears not only improper based upon the issues noted above, but cannot be determined from the *Petition*.

**6A Angel Smith, Shamontay Jones, and Faith Nutt (GUARD/P)**

**Case No. 15CEPR00450**

**Petitioner Smith, Hollistine (Pro Per – Paternal Grandmother – Petitioner)**

**Petition for Appt of Guardian of the Person**

	See petition for details.	NEEDS/PROBLEMS/COMMENTS:
		<u>Note:</u> This petition is for Angel only.
		<u>Note:</u> Page B is a petition for guardianship of Shamontay and Faith filed by Precious Henry, a cousin.
		<u>Continued from 10/25/16</u>
		The following issues remain noted:
		1. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Elliott Smith (Father)
		2. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Earnest Smith (Paternal Grandfather) - Ann Nutt (Maternal Grandmother)
		Reviewed by: skc
		Reviewed on: 12/1/16
		Updates:
		Recommendation:
		File 6A- Smith/ Jones/ Nutt
Cont. from 102516		
<input type="checkbox"/> Aff.Sub.Wit.		
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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		
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**6A**

**6B Angel Smith, Shamontay Jones, and Faith Nutt (GUARD/P)**

**Case No. 15CEPR00450**

Petitioner Henry, Precious (Pro Per – Cousin – Petitioner)

**Petition for Appointment of Guardian of the Person**

		See petition for details.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Note:</u> This petition is for Shamontay and Faith only.</p> <p><u>Note:</u> Page A is a petition for guardianship of Angel filed by Angel's paternal grandmother, Hollistine Smith.</p> <p><u>Continued from 10/25/16</u></p> <ol style="list-style-type: none"> <li>1. Need Confidential Guardian Screening Form GC-212.</li> <li>2. Need Notice of Hearing.</li> <li>3. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: <ul style="list-style-type: none"> <li>- Shamont Jones (Father)</li> <li>- Randy Hubbard (Father)</li> <li>- Deshawn Nutt (Mother)</li> </ul> </li> <li>4. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: <ul style="list-style-type: none"> <li>- All paternal grandparents</li> <li>- Edward Nutt (Maternal Grandfather)</li> <li>- Ann Nutt (Maternal Grandmother)</li> <li>- Siblings age 12 or older</li> </ul> </li> </ol>	
<b>Cont. from 102516</b>				
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<input type="checkbox"/>	Video Receipt			
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<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 12/1/16	
			Updates:	
			Recommendation:	
			File 6B- Smith/ Jones/ Nutt	

**6B**

<b>Age:</b> 9	<b>ABEL WRATE and YER WRATE</b> , paternal uncle and aunt, were appointed Co-Guardians on 08/26/15.  <b><u>Please see file for details</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Minute Order of 09/21/2016:</b> Counsel represent that the Oregon attorney is attempting to serve the mother, and if she is served but does not respond within 7 days, an order will be signed. However, the attorney might have to publish, so Counsel requests a continuance to December.  <b>1. Need copy of the Oregon order pursuant to Minute Order of 08/17/2016.</b>
Cont. from 120215, 030216, 071316, 081716, 092116		
<input type="checkbox"/> Aff.Sub.Wit.		
<input type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input 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		
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<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		<b>Reviewed by:</b> LV
		<b>Reviewed on:</b> 12/01/2016
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 7 - Her</b>

**First Account Current and Report of Trustee of the Special Needs Trust of Adrian Luis Barragan; and Petition for Allowance of Attorney Fees and Costs; and Request for Increase of Bond**

	<b>INLAND COUNTIES REGIONAL CENTER, INC.,</b>	<b>NEEDS/PROBLEMS/</b>
	Trustee, is Petitioner.	<b>COMMENTS:</b>
	<b>Account period: 9/3/15 – 8/31/16</b>	1. The Court may disallow the \$86.00 CourtCall cost as a cost of doing business under Local Rule 7.17.
	Accounting: \$168,403.08	
	Beginning POH: \$ 0.00	2. Need Order. See Local Rules 7.1.1.F and 7.6.1.
	Ending POH: \$165,251.48	
<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"/>	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	
	<b>Trustee: \$1,193.23</b> (Per Schedule I2)	
	<b>Petitioner states</b> on the order creating and funding the special needs trust, this Court did not adopt the proposed Fee Schedule of Master Trust of California and ordered the trustee compensation to be calculated at 1.50% of the value of the total trust estate. The Court further ordered that no trustee fees were to be paid without first obtaining Court approval. During preparation of the accounting, Petitioner's Counsel discovered that Petitioner had taken their usual fee pursuant to its fee schedule instead of 1.5% as ordered on 9/3/15. Upon discovery of the error, Petitioner immediately redeposited trustee fees of \$1,572.27 (including the \$750 initial set-up fee) back to the trust. The redeposit will be shown on the next accounting.	
	<b>Petitioner requests</b> authority to allow Master Trust of California to take an annual fee in quarterly payments pursuant to its Revised Fee Schedule of 2/14/12, attached as Exhibit M.	
	<b>Attorney: \$990.00</b> (for 2.8 attorney hours @ \$250/hr plus 2.9 paralegal hours @ \$100/hr, itemized at Exhibit L)	
	<b>Costs: \$86.00</b> (Courtcall)	
	<b>Current Bond is \$180,400.00. Based upon calculation, Petitioners request the bond be increased to \$181,800.00.</b>	
	<b><u>SEE ADDITIONAL PAGES</u></b>	
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 12/2/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 8- Barragan</b>

**Page 2 – Petitioner states** the format of this accounting has been altered from the requirements of Probate Code 1061-1064 because of the nature of the pooled special needs trust. See petition for description of format agreement between Petitioner and representatives of the Probate Examiners Offices of San Bernardino and Riverside Counties, where most of Petitioner's trusts are venued. The new accounting method requires that Petitioner show unrealized losses and gains in the accounting because the pooled SNT operates like a large mutual fund. Each individual member holds a percentage of all assets, and each individual's share fluctuates in value depending not only on the receipts and disbursements from their individual account, but also increases and decreases in value of the entire trust based on market fluctuations, buys and sells, as well as gains and losses, both realized and unrealized. The primary goal of the Master Trust is to minimize the risk of loss of principal while providing a reasonable level of current income and future income and modest appreciation of principal over time. The primary long-term objective of the Master Trust is to provide a relatively predictable, stable and constant (in real terms) level of support through current income and capital gains to the beneficiaries of individual trusts. To achieve this goal, it is necessary to preserve the real (i.e. inflation-adjusted) purchasing power of the trust. See petition for further description of fund investments.

**Examiner's Note:** Pursuant to the above description, schedules include Interest, Dividends, Realized Gains, Unrealized Gains, Realized Losses, Unrealized Losses, Attorney/Fiduciary Fees, General Administration Expenses, Medical Expenses, Other Disbursements, and POH.

**Petitioner requests an order:**

1. Approving, allowing, and settling the account and report of trustee in all respects as filed for the period of 9/3/15 – 8/31/16;
2. Approving attorney fees and costs of \$1,076.00 to Layne A. Bartholomew to be paid from the trust;
3. Approving trustee fees of \$1,193.23 to be paid from the trust;
4. Authorizing Master Trust of California to take an annual fee in quarterly payments pursuant to its fee schedule dated 2/14/12;
5. Increasing the bond to \$181,800.00; and
6. Other relief as the Court considers proper.

**Note: The Court will set a status hearing for the filing of the next account as follows:**

- **Tuesday, October 2, 2018**

Age: 86		CURTIS D. RINDLISBACHER, petitioner was Court appointed represent the Conservatee on 09/30/2015.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
Cont. from		<b>PUBLIC GUARDIAN</b> , was appointed Conservator of the Person and Estate on 11/18/2016.	
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified		Petitioner requests fees in connection with the petition to appoint the Public Guardian as Conservator of Jeff D. Ringer.	
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg		Petitioner asks that he be paid from the conservatorship estate for 12 attorney hours at \$345 per hour and one paralegal hour at \$120 for a total of <b>\$4,260.00</b> . Petitioner requests reimbursement in the amount of <b>\$435.00</b> .	
<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		Services are itemized by date and include review of documents, visits with client, and court appearances.	
<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			
			<b>Reviewed by:</b> LV
			<b>Reviewed on:</b> 12/02/2016
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 10- Ringer</b>

**11 Evangeline M. Orchard Living Trust Dated 11/9/93 Case No. 15CEPR00762**  
**Attorney Kruthers, Heather H. (for Public Administrator)**

**First and Final Account and Report of Successor Trustee; Petition for Allowance of Compensation to Successor Trustee and Her Attorney; and for Distribution**

	<b>PUBLIC ADMINISTRATOR</b> , Trustee, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>Account period: 8/5/15 – 10/13/16</b>	
	Accounting: \$32,017.52	
	Beginning POH: \$32,017.52	
	Ending POH: \$21,673.52	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	
<input checked="" type="checkbox"/>	<b>Verified</b>	
<input type="checkbox"/>	<b>Inventory</b>	
<input type="checkbox"/>	<b>PTC</b>	
<input type="checkbox"/>	<b>Not.Cred.</b>	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> W	
<input type="checkbox"/>	<b>Aff.Pub.</b>	
<input type="checkbox"/>	<b>Sp.Ntc.</b>	
<input type="checkbox"/>	<b>Pers.Serv.</b>	
<input type="checkbox"/>	<b>Conf. Screen</b>	
<input type="checkbox"/>	<b>Letters</b>	
<input type="checkbox"/>	<b>Duties/Supp</b>	
<input type="checkbox"/>	<b>Objections</b>	
<input type="checkbox"/>	<b>Video Receipt</b>	
<input type="checkbox"/>	<b>CI Report</b>	
<input type="checkbox"/>	<b>9202</b>	
<input checked="" type="checkbox"/>	<b>Order</b>	
<input type="checkbox"/>	<b>Aff. Posting</b>	
<input type="checkbox"/>	<b>Status Rpt</b>	
<input type="checkbox"/>	<b>UCCJEA</b>	
<input type="checkbox"/>	<b>Citation</b>	
<input type="checkbox"/>	<b>FTB Notice</b>	
	Trustee: \$1,280.70 (based on the statutory calculation for estate administrators)	
	Trustee (Extraordinary): \$248.00 (for preparation and filing of final tax return)	
	Attorney: \$1,280.70 (based on the statutory calculation for estate attorneys)	
	Bond fee: \$80.05	
	Costs: \$946.50 (filing, cert copies)	
	<b>Distribution pursuant to First Amendment to Trust:</b>	
	David Corbett: \$3,567.52	
	Gregory Popejoy: \$3,567.52	
	Jerry Willis: \$3,567.52	
	Timothy Jablonski: \$3,567.52	
	Eugene Gonzales: \$3,567.52	
	<b>Reviewed by: skc</b>	
	<b>Reviewed on: 12/2/16</b>	
	<b>Updates:</b>	
	<b>Recommendation:</b>	
	<b>File 11- Orchard</b>	

**First and Final Report of Administrator on Waiver of Account; Petition for Allowance of Compensation to Attorneys for Ordinary Services and for Final Distribution**

<b>DOD: 8/23/15</b>	<b>WILLIAM R. SEAY</b> , Son and Administrator with Full IAEA without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Accounting is waived	
	I&A: \$204,292.98	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	POH: \$113,832.85 cash plus obligation of Lisa Thompson of \$100,000 (from sale of real property), federal income tax refund of \$1,279.00 not yet received, and state income tax refund of \$428.00 not yet received	
<input checked="" type="checkbox"/> <b>Verified</b>		
<input checked="" type="checkbox"/> <b>Inventory</b>		
<input checked="" type="checkbox"/> <b>PTC</b>		
<input checked="" type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Administrator (statutory): Not requested	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>	Attorney (statutory): \$7,085.86	
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>	Costs: \$1,505.50 (filing, publication, certified letters, appraisal)	
<input type="checkbox"/> <b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>	Closing: \$1,500.00 plus tax refunds not yet received	
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>	Distribution pursuant to intestate succession, agreement:	
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>	Lisa Thompson: \$100,000 obligation plus cash of \$1,870.75	
<input checked="" type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>	William R. Seay: Cash of \$101,870.74	
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 12/2/16
		<b>Updates:</b>
		<b>Recommendation:</b> SUBMITTED
		<b>File 12- Seay</b>

**14 Payton Almaguer (GUARD/P)**

**Case No. 15CEPR00985**

**Petitioner: Maria Almaguer (Pro per – Paternal grandmother)**

**Petitioner: Noe Almaguer (Pro per – Paternal grandfather)**

**Petition for Appointment of Guardian of the Person**

		<p><b>MARIA ALMAGUER and NOE ALMAGUER</b>, paternal grandparents, are petitioners and request appointment as successor co-guardians.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. There is no vacancy. The current co-guardians consented to the successor guardianship, but there are presently no resignations filed with the Court.</p>
<b>Cont. from</b>		<p><b>CHRISTY DAWN BECKHAM and SCOTT ANTHONY BARNES</b>, maternal aunt and uncle, were previously appointed co-guardians on 12/14/2016.</p>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>	<p><i>Please see petition for details.</i></p>	
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>		
<input type="checkbox"/>	<b>Aff.Mail</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input checked="" type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input checked="" type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<p><b>Reviewed by:</b> SEF</p> <p><b>Reviewed on:</b> 12/2/2016</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 14- Almaguer</b></p>

**Status RE: Receipt for Blocked Account**

<b>DOD: 6/30/15</b>	<b>DAWN MAFANA</b> , Granddaughter, filed a <b>Petition for Letters of Administration</b> on 10/28/15, which alleged that the decedent died intestate.	<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <p><b>Note:</b> The Order for Probate has not yet been signed; it has been placed in the file for signature at this hearing.</p> <p>1. Need receipt for blocked account.</p> <p><b>Note:</b> The Court will set further status hearings as follows:</p> <ul style="list-style-type: none"> <li>• Tuesday, May 2, 2017 for filing the Inventory and Appraisal</li> <li>• Tuesday February 6, 2018 for filing the first or final account</li> </ul>
<b>Conf. from</b>	<b>LOUISE PARKS</b> , Friend, filed a competing <b>Petition for Probate of Will</b> on 12/8/15 which requested that a holographic instrument dated 4/27/11 be admitted to probate.	
<b>Aff.Sub.Wit.</b>	<b>LAUREL JEAN SEIBERT</b> , Daughter, filed a <b>Contest and Grounds of Objection to Petition for Probate of Purported Will</b> on 2/1/16.	
<b>Verified</b>	At Settlement Conference on 9/13/16, the parties reached oral agreement, and Mr. Bagdasarian was directed to prepare written agreement, and the Court set this status hearing for the filing of a receipt for blocked account.	
<b>Inventory</b>	<b>Stipulation Re Will Contest and Petition for Probate of Purported Will</b> signed by all parties and their respective counsel was filed 11/23/16 and the Court's Order thereon was entered 11/28/16.	
<b>PTC</b>	<b>Order entered 11/28/16 provides that:</b>	
<b>Not.Cred.</b>	1. Louise Parks shall serve as Executor without bond with Limited IAEA;	
<b>Notice of Hrg</b>	2. Dawn Mafana's petition is withdrawn;	
<b>Aff.Mail</b>	3. Laurel Jean Seibert's contest is withdrawn;	
<b>Aff.Pub.</b>	4. All parties shall execute declarations indicating the whereabouts of all personal property of the decedent;	
<b>Sp.Ntc.</b>	5. Dawn Mafana and Laurel Jean Seibert shall take all steps necessary to:	
<b>Pers.Serv.</b>	a. Transfer cash of \$5,000.00 to Louise Parks as Executor;	
<b>Conf. Screen</b>	b. Transfer any personal property in their possession to Louise Parks as Executor;	
<b>Letters</b>	c. take all steps necessary for the payment of the balance due of that certain Note in the face amount of \$40,000.00 dated 6/3/15 by Kenneth R. Boyd to Louise Parks as Executor	
<b>Duties/Supp</b>	6. Distribution of the estate (in due course, see stip) shall be 50% to Louise Parks and 50% to the class of natural or adopted great-grandchildren of the decedent;	
<b>Objections</b>	7. Louise Parks shall waive statutory commissions;	
<b>Video Receipt</b>	8. Attorneys Bagdasarian and Petrie shall waive any attorney's fees to be payable from the estate.	
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 12/2/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 15- Johnson</b></p>

**16A Stevee Barboza, Apollonia Barboza (GUARD/P) Case No. 15CEPR01160**

Petitioner: Caroline Barboza (Pro per - Mother)

Guardian: Gabrielle Vasquez (Pro per – Sister)

Guardian: Carmen Barbosa (Pro per – Maternal grandmother)

**Petition for Visitation**

		<p><b>CAROLINE BARBOZA</b>, mother, is petitioner.</p> <p><b>CARMEN BARBOSA</b> and <b>GABRIELLE VASQUEZ</b>, maternal grandmother and sister, were appointed co-guardians on 4/13/16.</p> <p><i>Please see petition for details.</i></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 11/7/2016.</b></p> <p><b>Please see related page 16B.</b> Petitioner has also filed a <i>Petition to Terminate the Guardianship</i>.</p> <p>1. Need <i>Notice of Hearing</i>.</p> <p><b>Note:</b> A proof of service of <i>Notice of Hearing</i> was filed of the 12/6/2016 hearing for all parties entitled to notice. However, a <i>Notice of Hearing</i> has not been filed.</p>	
Cont. from 101116, 110716				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	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			
<p><b>Reviewed by:</b> KT / SEF</p> <p><b>Reviewed on:</b> 12/1/2016</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 16A- Barboza</b></p>				

**16B Stevee Barboza, Apollonia Barboza (GUARD/P) Case No. 15CEPR01160**

Petitioner: Caroline Barboza (Pro per - Mother)

Guardian: Gabrielle Vasquez (Pro per – Sister)

Guardian: Carmen Barbosa (Pro per – Maternal grandmother)

**Petition for Termination of Guardianship**

		<b>CAROLINE BARBOZA</b> , mother, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>CARMEN BARBOSA</b> and <b>GABRIELLE VASQUEZ</b> , maternal grandmother and sister, were appointed co-guardians on 4/13/16.	
<b>Cont. from 110716</b>		<b>Court Investigator report filed 11/10/2016.</b>	<b>Continued from 11/7/2016.</b>
	<b>Aff.Sub.Wit.</b>		<b>Please see related page 16A.</b> re: <i>Petition for Visitation.</i>
✓	<b>Verified</b>		2. Need <i>Notice of Hearing.</i>
	<b>Inventory</b>		<b>Note:</b> A proof of service of <i>Notice of Hearing</i> was filed of the 12/6/2016 hearing for Carmen Barbosa, Gabrielle Vasquez and Apollonia. However, a <i>Notice of Hearing</i> has not been filed.
	<b>PTC</b>	<i>Please see petition for details.</i>	3. Need proof of service with at least 15 days notice of the <i>Notice of Hearing</i> <u>or</u> consents and waivers of notice <u>or</u> declarations of due diligence for:
	<b>Not.Cred.</b>		a. Ronald Rubio Jr. (father of Apollonia)
	<b>Notice of Hrg</b>	x	b. Estevan Delsid (father of Stevee)
	<b>Aff.Mail</b>	x	c. Ronaldo Rubio (paternal grandfather of Apollonia)
	<b>Aff.Pub.</b>		d. Cea-Dum Rubio (paternal grandmother of Apollonio)
	<b>Sp.Ntc.</b>		e. Paternal grandparents (of Stevee)
	<b>Pers.Serv.</b>		f. Alfred Barboza (maternal grandfather)
	<b>Conf. Screen</b>		
	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
✓	<b>CI Report</b>		
	<b>9202</b>		
	<b>Order</b>	x	
	<b>Aff. Posting</b>		<b>Reviewed by:</b> KT / SEF
	<b>Status Rpt</b>		<b>Reviewed on:</b> 12/1/2016
	<b>UCCJEA</b>		<b>Updates:</b>
	<b>Citation</b>		<b>Recommendation:</b>
	<b>FTB Notice</b>		<b>File 16B- Barboza</b>

Probate Status Hearing re: Failure to File Inventory and Appraisal

<b>DOD: 10/17/2015</b>	<b>ADELA LOPEZ PALMA CUEVAS</b> , surviving spouse, was appointed Administrator with full IAEA with \$1,000,000.00 bond after a contested court trial on 7/6/2016.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p style="text-align: center;"><b>OFF CALENDAR.</b> Final I&amp;A filed 12/1/2016.</p>
<b>Cont. from</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Letters issued 10/4/2016	
<input type="checkbox"/> <b>Verified</b>		
<input checked="" type="checkbox"/> <b>Inventory</b>	Notice of Status Hearing dated 10/7/2016 set this matter for status for failure to file an inventory and appraisal.	
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>	A final inventory and appraisal was filed 12/1/2016 showing the estate value of <b>\$1,119,841.18.</b>	
<input type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> SEF
		<b>Reviewed on:</b> 12/1/2016
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 17- Cuevas</b>



**Page 2**

**Petitioner states** Decedent was unmarried at his death. He had one child, Stephanie Taylor, who was formally adopted by a third party thereby cutting off her inheritance rights pursuant to Probate Code §6451. Petitioner has no knowledge of any person, aside from herself, who could have an interest in the property or alternatively in Decedent's estate.

**Petitioner requests the Court to find and determine as follows:**

1. Decedent survived the Settlor of the trust;
2. Upon Settlor's death, Decedent was the primary beneficiary of the trust;
3. Decedent's interest in the property vested upon Settlor's death;
4. Decedent was the true owner of the property;
5. Petitioner, in her capacity as successor trustee of the Lorene Taylor Living Trust of 2006, should be ordered and directed to transfer the property to Petitioner in her capacity as Administrator of Decedent's estate; and
6. For such other orders as the Court considers proper.

Status RE: Filing of the Inventory and Appraisal

<b>DOD: 1/11/16</b>	<p><b>HARVEY BOGANWRIGHT</b> was appointed Executor with Full IAEA without bond on 7/7/16 and Letters issued 7/8/16.</p> <p>At the hearing on 7/7/16, the Court set this status hearing for the filing of the Inventory and Appraisal.</p> <p>Partial I&amp;A No. 1 was filed 11/15/16. A Corrected Partial I&amp;A was filed 11/28/16.</p> <p>No Final I&amp;A has yet been filed.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>1. Need Final Inventory and Appraisal pursuant to Probate Code §8800 or written status report pursuant to Local Rule 7.5.</b></p>
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<b>Reviewed by:</b> skc	
	<b>Reviewed on:</b> 12/2/16	
	<b>Updates:</b>	
	<b>Recommendation:</b>	
	<b>File 19- Petlak</b>	

Attorney David A. Roberts (for Lisa Nilmeier, Administrator)

Probate Status Hearing Re: Filing of the Final Inventory and Appraisal

<b>DOD: 3/11/2016</b>	<b>LISA NILMEIER</b> , cousin by marriage, was appointed as Administrator with full IAEA with bond of \$ 200,000.00.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from 102516</b>	<b>Proof of Bond in the sum of \$200,000.00</b> was filed on 6/14/2016.	<b>OFF CALENDAR</b>
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		<b>Final Inventory and Appraisal</b>
<input type="checkbox"/> <b>Verified</b>		<b>filed 12/1/2016.</b>
<input checked="" type="checkbox"/> <b>Inventory</b>	<b>Letters issued on 6/15/2016.</b>	
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>	<b>Pursuant to Probate Code § 8800(b)</b> , Final Inventory and Appraisal was due <b>10/15/2016</b> .	
<input type="checkbox"/> <b>Notice of Petn Admin</b>		
<input type="checkbox"/> <b>Aff.Mail</b>	<b>Minute Order dated 5/26/2016</b> from the hearing on the petition for letters of administration set the matter for a Status Hearing on 10/25/2016 for filing of the final inventory and appraisal.	
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		<b>Reviewed by: LEG</b>
<input type="checkbox"/> <b>Status Rpt</b>		<b>Reviewed on: 12/1/2016</b>
<input type="checkbox"/> <b>UCCJEA</b>		<b>Updates:</b>
<input type="checkbox"/> <b>Citation</b>		<b>Recommendation:</b>
<input type="checkbox"/> <b>FTB Notice</b>		<b>File 20- Zuccarini</b>

Probate Status Hearing RE: Proof of Bond

		<p><b>KATHLEEN SOWELL</b>, sister, was appointed conservator of the person and estate with medical consent powers and bond of \$51,000.00 on 11/3/2016.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. <b>Need bond or current written status report</b> pursuant to Local Rule 7.5, which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the status report shall be served on all necessary parties.</p>
		<p><b>Minute order dated 11/3/2016</b> set this matter for status re: proof of filing the bond.</p>	
<b>Cont. from</b>			
	<b>Aff.Sub.Wit.</b>		
	<b>Verified</b>		
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
	<b>Notice of Hrg</b>		
	<b>Aff.Mail</b>		
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>	x	
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
			<b>Reviewed by:</b> SEF
			<b>Reviewed on:</b> 12/2/2016
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 21- Patridge</b>

Petitioner Carlos Palafox (Pro Per, maternal grandfather)  
 Petitioner Rosalinda Palafox (Pro Per, maternal grandmother)

**Petition for Appointment of Guardian of the Person**

		<p><b>TEMPORARY GRANTED ON COURT'S OWN MOTION EXPIRES 12/6/2016</b></p> <p><b>CARLOS PALAFOX and ROSALINDA PALAFOX</b>, maternal grandparents, are Petitioners.</p> <p align="center"><i>~Please see Petition for details~</i></p> <p><b>Court Investigator's Report was filed 10/18/2016.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u><b>Continued from 10/25/2016.</b></u>  <i>Minute Order</i> states examiner notes provided in open court. For the record, the half-siblings, Brianna and Natalie, are both under the age of 12. Manuel Mondragon, father, orally consents to the guardianship in open court. Mr. Mondragon is to have a specific request for visitation in mind at the 12/6/2016 hearing. The Court grants temporary orders to preserve the status quo; Letters are 10 issue forthwith.</p>	
<b>Cont. from 102516</b>				
<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 checked="" type="checkbox"/>	Pers.Serv.			
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	Clearances			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 12/1/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 22- Palafox</b></p>		

**24 The Carl Vernon and Laverne V. Pielop Family Trust Case No. 16CEPR00969**

Attorney **Armas, J. Todd (for Petitioner Vanessa Poeschel)**

**Petition to Compel Trustee to Comply with Probate Code Sections 16060 and 16061.7, to Account, for Relief from Breach of Trust, for Suspension of Trustee and for Removal of Trustee (Probate Code Sec. 164200, 17200(b)(10))**

Carl Vernon Pielop DOD: 1/6/06	VANESSA POESCHEL, Daughter and Beneficiary, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b> <b>Minute Order 11/1/16: Counsel requests time to cure the notice defects.</b>
Laverne V. Pielop DOD: 9/23/15		
	<b>Petitioner states</b> she is a beneficiary of the Carl Vernon and Laverne V. Pielop Family Trust (Pielop Trust) executed by Carl and Laverne Pielop on 4/1/91 in Fresno, CA.	<b>The following issues remain noted:</b>
<b>Cont. from 110116</b>		<b>1. Need clarification as to Fresno, CA, as proper venue for this petition pursuant to Probate Code §17005(a)(1). The trustee resides in Potomac, MD and appears to have been administering the trust there since 9/23/15.</b>
<input type="checkbox"/> Aff.Sub.Wit.	Carl Pielop died 1/6/06. Laverne Pielop died 9/23/15. Since 9/23/15, <b>KAREN PETERSON</b> , a resident of Potomac Maryland, has been and currently is the Trustee of the Pielop Trust.	<b>2. Petitioner does not provide a copy of the trust for review. Need copy of trust for Court review.</b>
<input checked="" type="checkbox"/> Verified		<b>3. Need Notice of Hearing.</b>
<input type="checkbox"/> Inventory		<b>4. Need proof of service of Notice of Hearing at least 30 days prior to the hearing on interested parties pursuant to Probate Code §17203:</b>
<input type="checkbox"/> PTC	The trustee has never provided Petitioner with notice required under Probate Code §16061.7 or an account of the trust. Throughout 2015, Petitioner asked the trustee for status and a breakdown of transactions made by her as trustee. The only reply was an email dated 11/9/15, which provided no information (Exhibit A).	<b>- Karen Peterson (Trustee) and her attorney, if any</b>
<input type="checkbox"/> Not.Cred.		<b>- Cris Schneider Estate c/o Brett Dixon (unclear whether Brett Dixon is the personal representative or an heir or whether additional heirs may be entitled to notice)</b>
<input type="checkbox"/> Notice of Hrg		<b>Note: Petitioner filed a Proof of Service on Karen Peterson showing service of the petition only on 11/9/16, which is not quite 30 days, and it does not include the mandatory Judicial Council Notice of Hearing, which contains mandatory notice language.</b>
<input type="checkbox"/> Aff.Mail		<b>SEE ADDITIONAL PAGES</b>
<input type="checkbox"/> Aff.Pub.	On 6/8/16, Petitioner emailed the trustee some information on trusts that she had acquired when she herself had been a trustee (Exhibit B).	<b>Reviewed by: skc</b>
<input type="checkbox"/> Sp.Ntc.		<b>Reviewed on: 12/1/16</b>
<input type="checkbox"/> Pers.Serv.	On 7/14/16, Petitioner hired Attorney Armas to reach out to the trustee (Exhibit C). Correspondence was received from the trustee that she retained an attorney, but no other information was provided. Nearly 1 year has passed since the surviving settlor's death.	<b>Updates: 12/2/16</b>
<input type="checkbox"/> Conf. Screen		<b>Recommendation:</b>
<input type="checkbox"/> Letters	Probate Code §16062 provides for annual accounting to beneficiaries, and §16000 puts a duty on the trustee to administer the trust according to the trust instrument, which requires annual accountings.	<b>File 24- Vernon/ Pielop</b>
<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		

**SEE ADDITIONAL PAGES**

## 24 The Carl Vernon and Laverne V. Pielop Family Trust Case No. 16CEPR00969

Page 2

**Petitioner alleges** that the trustee has transferred the settlor's vehicle to her son in violation of her duty not to use trust property for the trustee's own profit or for any other purpose unconnected with the trust. See § 16004(a). Petitioner alleges that the trustee is in breach of her duties as trustee as she has:

- a) Failed to provide Petitioner with information related to her interest in the trust as requested by Petitioner as required under Probate Code § 16061;
- b) Failed to provide the beneficiaries with an annual account as required under § 16062;
- c) Used trust funds for her own profit and for purposes unconnected with the trust.

Petitioner alleges that there has been a loss in value of the trust estate as a proximate result of the trustee's numerous breaches.

Petitioner states the beneficiaries are Petitioner, the Estate of Cris Schneider, c/o Brett Dixon of Lake Forest, CA, and Karen Peterson, named as Karen Braun in the trust, of Potomac, MD.

**Petitioner requests that:**

1. **Trustee be compelled to prepare and file with this court an account of the Pielop Trust from 9/23/15 to present;**
2. **Trustee be compelled to redress her breaches of trust by payment of money damages according to proof;**
3. **Trustee be removed as trustee of the Pielop Trust;**
4. **Trustee be suspended as trustee of the Pielop Trust and the court appoint a temporary trustee to take possession of the trust property and administer the trust;**
5. **The Court order such attorney fees and costs as it may be allowed by law;**
6. **The Court order such other and further relief as it may seem (sic) proper.**

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### NEEDS/PROBLEMS/COMMENTS (Cont'd):

5. **Petitioner requests suspension and removal of the trustee and appointment of a temporary trustee, but does not specify or nominate anyone as temporary or successor trustee. Need clarification.**
6. **If a temporary or successor trustee is appointed who is not named in the trust instrument, bond is required pursuant to Probate Code §15602 unless waived by all adult beneficiaries. Need estimated value of trust for bond purposes.**

**Note:** The proposed order contains numerous blanks for the Court to fill in. The Court may require a revised completed order after the hearing from the attorney.

Petitioner: Tara Lynne Boles (Pro per – Maternal grandmother)

Petition for Appointment of Guardian of the Person

		<b><u>NO TEMPORARY - NOT REQUESTED</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need <i>Notice of Hearing</i> . 2. Need proof of 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: a. Roland Jones (paternal grandfather) b. Pamla Hall (paternal grandmother)
		TARA BOLES, maternal grandmother, is petitioner	
		<i>Please see petition for details.</i>	
Cont. from			
	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		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			<b>Reviewed by:</b> SEF
			<b>Reviewed on:</b> 12/2/2016
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 25- Jones</b>