

(1) First and Final Report of Executor on Waiver of Account and for (2) Final Distribution

Age:		NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED TO 1-28-14</u> Per attorney request
DOD:		
Cont. from		
<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	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: skc
		Reviewed on: 12-6-13
		Updates:
		Recommendation:
		File 1 – Soto

(1) Petition for Approval of First and Final Account and Report; (2) for Approval of Payment of Executor's Fees and Reimbursement of Costs Advanced; (3) for Approval of Payment of Attorney's Statutory and Extraordinary Fees; and (4) for Final Distribution [Prob. C. 1060 et seq., 10800, 10810, 10811, 10951, 11000, 11640, CRC 7.702, 7.703]

DOD: 3/13/2011		LEONORE SCHREIBER , Executor, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Extraordinary fee requests includes fees totaling \$250.00 for the attorney to obtain a tax ID number and advise Executor to file tax returns. This service appears to be statutory in nature and not extraordinary. 2. Costs includes \$36.50 in runner services. Local Rule 7.17 states the court considers runners services to be a part of the cost of doing business and is therefore not reimbursable. 3. Need Order
		Account period: 6/16/11 – 10/31/13	
Cont. from		Accounting - \$44,974.37	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$38,900.00	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$26,841.76	
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC	Executor (statutory) - \$1,398.98	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Attorney (statutory) - \$1,398.98	
<input checked="" type="checkbox"/>	Aff.Mail	Attorney x/o (per itemization and declaration for tax matters, sale of personal property, sale of mineral interest and disposition of burial plots) - \$2,450.00	
<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	Costs (certified copies, filing fees, taxes, publication and probate referee) - \$2,804.50	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt	Closing - \$1,000.00	
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202	Distribution pursuant to Decedent's Will is to:	
<input type="checkbox"/>	Order	Leonore Schreiber – personal property consisting of 2 guns and a Japanese Teak Chest.	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice	Sierra Club - \$4,163.10 Yosemite Conservancy - \$4,163.10 Big Sur Land Trust - \$4,163.10	
			Reviewed by: KT
			Reviewed on: 12/6/13
			Updates:
			Recommendation:
			File 2 – Goddard

(1) First Account and Report of Guardian, (2) Petition for Attorneys Fees [Prob. C. 2620]

Age: 12 years		MARLEEN C. MAFFEO , mother/guardian, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need declaration in support of attorney fees. California Rules of Court, Rule 7.751. 2. Need schedule listing the property on hand at the fair market value. Probate Code § 1063(a). (Note: Bank statements show that the current value of the stocks and securities is \$148,652.28. Therefore the fair market value of the estate would total \$389,256.77. This would mean that the bond should be increased to \$440,580.00) 3. Need proposed order <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Friday, September 11, 2015 at 9:00 a.m. in Department 303, for the filing of the second account. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
		Account period: 7/18/12 – 7/17/13	
Cont. from		Accounting - \$246,855.69	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$235,589.46	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$242,776.50	
<input type="checkbox"/>	Inventory	Current bond is \$335,000.00.	
<input type="checkbox"/>	PTC	Guardian - waives	
<input type="checkbox"/>	Not.Cred.	Attorney - \$4,371.63	
<input checked="" type="checkbox"/>	Notice of Hrg	Petitioner prays for an Order:	
<input checked="" type="checkbox"/>	Aff.Mail	<ol style="list-style-type: none"> 1. Approving, allowing and settling the first account and report; 2. Authorizing payment of attorney fees in the sum of \$4,371.63. 	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	2620(c)		
<input 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: KT			
Reviewed on: 12/9/13			
Updates:			
Recommendation:			
File 3 – Maffeo			

Atty Sanoian, Joanne (for Petitioner/Guardian Marleen C. Maffeo (1) First Account and Report of Guardian, (2) Petition for Attorneys Fees [Prob. C. 2620])

Age: 9 years		MARLEEN C. MAFFEO , mother/guardian, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>4. Need declaration in support of attorney fees. California Rules of Court, Rule 7.751.</p> <p>5. Need schedule listing the property on hand at the fair market value. Probate Code § 1063(a). (Note: Bank statements show that the current value of the stocks and securities is \$148,652.28. Therefore the fair market value of the estate would total \$389,256.77. This would mean that the bond should be increased to \$440,580.00)</p> <p>6. Need proposed order</p> <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Friday, September 11, 2015 at 9:00 a.m. in Department 303, for the filing of the second account. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
		Account period: 7/18/12 – 7/17/13	
Cont. from		Accounting - \$246,855.69	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$235,589.46	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$242,776.50	
<input type="checkbox"/>	Inventory	Current bond is \$335,000.00.	
<input type="checkbox"/>	PTC	Guardian - waives	
<input type="checkbox"/>	Not.Cred.	Attorney - \$4,371.63	
<input checked="" type="checkbox"/>	Notice of Hrg	Petitioner prays for an Order:	
<input checked="" type="checkbox"/>	Aff.Mail w/	3. Approving, allowing and settling the first account and report;	
<input type="checkbox"/>	Aff.Pub.	4. Authorizing payment of attorney fees in the sum of \$4,371.63.	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	2620(c)		
<input 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: KT			
Reviewed on: 12/9/13			
Updates:			
Recommendation:			
File 4 – Maffeo			

Atty Wall, Jeffrey L., sole practitioner (for Petitioner Steven W. Souza, Administrator)

(1) First and Final Report of Administrator and Petition for Its Approval, (2) for Allowance of Attorney Fee and (3) for Final Distribution Upon Waiver of Accounting

DOD: 3/20/2012	STEVEN W. SOUZA , son and Administrator, is Petitioner.		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need <i>Notice of Hearing</i> of and proof of mailed service of 15 days' notice prior to hearing pursuant to Probate Code §§ 11000 and 11601 for the following persons:</p> <ul style="list-style-type: none"> • Louie Lee Souza; • Manuel J. Souza, Jr.
	Accounting is waived.		
Cont. from	I & A	— \$180,000.00	
<input type="checkbox"/> Aff.Sub.Wit.	POH	— \$180,000.00 <i>(real property)</i>	
<input checked="" type="checkbox"/> Verified			
<input checked="" type="checkbox"/> Inventory	Administrator	— waives	
<input checked="" type="checkbox"/> PTC	Attorney	— \$5,500.00	
<input checked="" type="checkbox"/> Not.Cred.	<i>(less than \$6,400.00 statutory; to be paid outside probate.)</i>		
Notice of Hrg	X		
Aff.Mail	X		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters	041013		
Duties/Supp			
Objections			
Video Receipt			
CI Report			
<input checked="" type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
<input checked="" type="checkbox"/> FTB Notice			
			Reviewed by: LEG
			Reviewed on: 12/6/13
			Updates:
			Recommendation:
			File 5 – Souza

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

DOD: 09/28/2011		ESTELLA G. GARZA and RAQUEL G. NUNEZ , request that ESTELA G. GARZA, RAQUEL G. NUNEZ , and ROJELIA G. GONZALEZ , daughters, be appointed co-executors without bond. Full IAEA - ? Will dated: 09/27/2001 Residence: Parlier Publication: Need Estimated value of the Estate: Personal property - \$20,880.00 Real property - \$272,907.00 Total - \$293,787.00 Probate Referee: Steven Diebert	NEEDS/PROBLEMS/COMMENTS: 1. Original Will is attached to the petition. Pursuant to Probate Code §8200(a)(1) the original will is to be deposited with the Court. 2. Will is not self-proving. Need proof of Subscribing Witness. 3. Need name and date of death of the decedent's spouse pursuant to Local Rule 7.1.1D. 4. Need proof of service of Notice of Petition to Administer Estate on Teodora Garza Garza. Note: Teodora Garza Garza was served in care of Estella Garza Garza, Trustee. Service in care of another person is insufficient pursuant to CA Rules of Court 7.51 (a)(1). 5. Need Affidavit of Publication. 6. Need Duties & Liabilities of Personal Representative. 7. Need Confidential Supplement to Duties & Liabilities of Personal Representative. 8. #5a(3) or 5a(4) was not answered regarding domestic partner. 9. #5a(7) or 5a(8) of the Petition was not answered regarding issue of predeceased child. 10. Need Letters. 11. Need Order. Please see additional page for Status Hearings
Cont. from			
Aff.Sub.Wit.	X		
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail	W/		
Aff.Pub.	X		
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters	X		
Duties/Supp	X		
Objections			
Video Receipt			
CI Report			
9202			
Order	X		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: LV			
Reviewed on: 12/06/2013			
Updates:			
Recommendation:			
File 6 – Garza			

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

- **Friday, 05/09/2014 at 9:00a.m. in Dept. 303** for the filing of the inventory and appraisal **and**
- **Friday, 02/13/2015 at 9:00a.m. in Dept. 303** for the filing of the first account and final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.

Atty Sanoian, Joanne (for Petitioner Trevor A. Smith)

Atty Betts, James B. (for Objector Susette Ishizuka)

Atty Willoughby, Hugh (for Objectors Faith Ishizuka and Stephanie Ishizuka)

Petition for Confirmation of Trustee's Fees and for Imposition of Constructive Trust

[Prob. C. 16420(a)(8), 17200 et seq.]

Mary Ishizuka (Settlor) DOD: 12-26-04	TREVOR A. SMITH , widower and Administrator Of the Estate of Cathy D. Imai, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:																																														
Cathy D. Imai (Trustee) DOD: 5-8-10	Petitioner states prior to her death, Cathy D. Imai was the acting trustee of the Mary Ishizuka Living Trust dated 3-27-92 as amended 11-27-04. On behalf of Ms. Imai's estate, Petitioner brings this petition against the trust beneficiaries LIANN ISHIZUKA, FAITH DAPHNE ISHIZUKA, and STEPHANIE ISHIZUKA.	<u>Note:</u> These Examiner Notes are a synopsis of the Petition referenced above and Objections thereto. This is <u>not</u> a review of the accounting statements and documentation provided as exhibits to the petition and referenced in the objections with reference to the various distributions and payments made.																																														
	Petitioner states venue is proper in Fresno County because the last acting successor trustee, SUSETTE ISHIZUKA , resides in Fresno County.	<ol style="list-style-type: none"> 1. The petition does not include the list of names and addresses of each person entitled to notice of the petition as required by Probate Code §17201. 																																														
<table border="1"> <tr> <td data-bbox="151 548 297 579">Aff.Sub.Wit.</td> <td data-bbox="337 548 378 579"></td> </tr> <tr> <td data-bbox="151 590 253 621">✓ Verified</td> <td data-bbox="337 590 378 621"></td> </tr> <tr> <td data-bbox="151 632 277 663">Inventory</td> <td data-bbox="337 632 378 663"></td> </tr> <tr> <td data-bbox="151 674 204 705">PTC</td> <td data-bbox="337 674 378 705"></td> </tr> <tr> <td data-bbox="151 716 277 747">Not.Cred.</td> <td data-bbox="337 716 378 747"></td> </tr> <tr> <td data-bbox="151 758 323 789">✓ Notice of Hrg</td> <td data-bbox="337 758 378 789"></td> </tr> <tr> <td data-bbox="151 800 253 831">✓ Aff.Mail</td> <td data-bbox="337 800 378 831">w</td> </tr> <tr> <td data-bbox="151 842 253 873">Aff.Pub.</td> <td data-bbox="337 842 378 873"></td> </tr> <tr> <td data-bbox="151 884 253 915">Sp.Ntc.</td> <td data-bbox="337 884 378 915"></td> </tr> <tr> <td data-bbox="151 926 277 957">Pers.Serv.</td> <td data-bbox="337 926 378 957"></td> </tr> <tr> <td data-bbox="151 968 323 999">Conf. Screen</td> <td data-bbox="337 968 378 999"></td> </tr> <tr> <td data-bbox="151 1010 237 1041">Letters</td> <td data-bbox="337 1010 378 1041"></td> </tr> <tr> <td data-bbox="151 1052 310 1083">Duties/Supp</td> <td data-bbox="337 1052 378 1083"></td> </tr> <tr> <td data-bbox="151 1094 297 1125">✓ Objections</td> <td data-bbox="337 1094 378 1125"></td> </tr> <tr> <td data-bbox="151 1136 253 1167">Video Receipt</td> <td data-bbox="337 1136 378 1167"></td> </tr> <tr> <td data-bbox="151 1178 277 1209">CI Report</td> <td data-bbox="337 1178 378 1209"></td> </tr> <tr> <td data-bbox="151 1220 220 1251">9202</td> <td data-bbox="337 1220 378 1251"></td> </tr> <tr> <td data-bbox="151 1262 237 1293">✓ Order</td> <td data-bbox="337 1262 378 1293"></td> </tr> <tr> <td data-bbox="151 1472 297 1503">Aff. Posting</td> <td data-bbox="337 1472 378 1503"></td> </tr> <tr> <td data-bbox="151 1514 277 1545">Status Rpt</td> <td data-bbox="337 1514 378 1545"></td> </tr> <tr> <td data-bbox="151 1556 261 1587">UCCJEA</td> <td data-bbox="337 1556 378 1587"></td> </tr> <tr> <td data-bbox="151 1598 253 1629">Citation</td> <td data-bbox="337 1598 378 1629"></td> </tr> <tr> <td data-bbox="151 1640 285 1671">FTB Notice</td> <td data-bbox="337 1640 378 1671"></td> </tr> </table>	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		9202		✓ Order		Aff. Posting		Status Rpt		UCCJEA		Citation		FTB Notice		Pursuant to the trust. Beneficiary Liann Ishizuka would receive ½ of the trust assets and beneficiaries Daphne Faith Ishizuka and Faith Ishizuka would each receive ¼ of the trust assets. No beneficiary would receive the entirety of her distribution until age 21. As trustee, Ms. Imai's duties included making numerous distributions to payees related to beneficiaries' schooling and education, renovating and selling the trust's real property, and preparing and filing annual tax returns. Ms. Imai, who was a bookkeeper and tax preparer by profession in both Los Angeles and Ventura Counties, diligently administered the trust for those 4½ years and kept detailed, meticulous records of all trust activities. At the time of her death, Ms. Imai had not been paid all of her earned trustee fees for acting as successor trustee for the years 2005, 2006, 2007, 2008, and 2009, and totaling \$40,478.88 (see footnote in petition re calculation reached with assistance of CPA).	<ol style="list-style-type: none"> 2. The Court may require clarification regarding the details of the civil case 12CECG03404 as referenced in the Objection and Request for Judicial Notice.
Aff.Sub.Wit.																																																
✓ Verified																																																
Inventory																																																
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FTB Notice																																																
	Petitioner states that at Ms. Imai's death and during the fall of 2010, Petitioner, through his attorney William Bullis, advised the named successor trustees of the trust, JUN FUKISHIMA and SUSETTE ISHIZUKA , that Ms. Imai had passed away and that it was necessary for one of them to take over as successor trustee. Mr. Bullis further indicated that Ms. Imai's trustee fees and costs were owing for 2005-2009. No response was received from the named successor trustees.	<ol style="list-style-type: none"> 3. The Court may require clarification regarding Petitioner's authority and standing to bring this petition under as Administrator of the Estate of Cathy D. Imai, with reference to Probate Code §§ 16420(a) and 17200. 																																														
	<u>SEE ADDITIONAL PAGES</u>	Reviewed by: skc																																														
	Reviewed on: 12-9-13	Updates:																																														
	Recommendation:	File 7 – Ishizuka																																														

Page 2

In late 2010, at the request of beneficiary Liann Ishizuka, Petitioner caused both a formal and informal accounting to be prepared for the years that Ms. Imai served as trustee (December 2004 through October 31, 2010), which were sent to the beneficiaries in December 2010. One of the accountings was prepared by Ventura County CPA Lou Torres. No response or objection was received to the accountings, both of which included the amount of Ms. Imai's owing trustee fees.

In early September 2011, Petitioner was advised by Susetta Ishizuka that she had taken over as successor trustee on 8-11-11, and in her capacity as successor trustee had distributed the entirety of the trust assets to the beneficiaries.

Ms. Imai's fees and costs remain unpaid and owing pursuant to the trust's terms. Paragraph 8.06 of the trust reads: "All Trustees shall be entitled to reasonable compensation for services rendered and reimbursement for reasonable out-of-pocket costs in connection with the administration of this Trust." Ms. Imai was never paid her earned trustee fees for management and administration for 2005 through 2009. Ms. Imai marketed and sold the Trust's real property, dutifully answered to the ongoing requests of the beneficiaries, made numerous payments out of the Trust for the educational benefit of the beneficiaries, prepared the Trust's tax returns, and as stated, maintained detailed and accurate records of the Trust's activity.

While the trust mandates that Ms. Imai receive a trustee's fee for her work, the trust is silent on the amount of the fees. Petitioner cites Probate Code §§ 15681 and 15684 for factors for consideration in determining reasonable compensation. Petitioner states the fees requested are extremely reasonable, averaging approx. \$705.00/month for each of the 4 ½ years, which calculates to approx. 10 hours/month at \$70.00/hr. This amount is would be deemed very reasonable for the oversight of the most simple trust. This trust, on the other hand, which at her death had an approx. value of \$720,000.00, was not a trust in which the assets were simply to be distributed upon the settlor's death. It was necessary for Ms. Imai to oversee and administer the trust prior to the beneficiaries reaching a certain age. Ms. Imai made multiple payments on behalf of the beneficiaries, kept in contact, and was consistently responsive to their needs and questions. In addition, she utilized her professional skills and expertise in preparing and filing the trust's tax returns. Administration did require more than an ordinary person's skill and judgment, and Ms. Imai was loyal to the trust and beneficiaries through her administration and maintained details records. Her earned and outstanding fees should be confirmed by the Court.

The Court may impose equitable remedy of a constructive trust on the previously distributed trust assets for the amount of Ms. Imai's trustee's fees and costs. Authority cited.

Petitioner requests:

- 1. Court confirmation of Ms. Imai's earned trustee fees and costs for the years 2005 through 2009 totaling \$40,478.88;**
- 2. Imposition of a constructive trust in the amount of the confirmed trustee fees and costs, on the assets of the three beneficiaries, LIANN ISHIZUKA, FAITH DAPHNE ISHIZUKA, and STEPHANIE ISHIZUKA, which constitute and/or consist of the confirmed trustee fees and costs; and**
- 3. For any further orders that the Court deems just and proper.**

SEE ADDITIONAL PAGES

Page 3

Objection filed 12-2-13 by Susette Ishizuka, successor trustee, states that during Ms. Imai's tenure, she failed to provide annual accountings as required by Probate Code § 16062. To this date, a full accounting with detail on transactions has not been provided. Ms. Ishizuka received only summary profit and loss statements, balance sheets, and the list of distributions attached to the petition. A detailed accounting has never been provided to the successor trustee. As such, Ms. Ishizuka has never been privy to the "detailed, meticulous records of all trust activities" as averred to have been maintained by Ms. Imai.

Moreover, while the trust required distributions of the balance of the estate to the beneficiaries at the age of 21, Ms. Imai failed to do so. For instance, Liann Ishizuka reached the age of 21 on 11-8-09, yet the trustee failed to make the distribution required by the trust. Ms. Imai died in or about May 2010. In late 2010, her estate transferred trustee duties to Susette Ishizuka. Since the beneficiaries were over 21 and distribution was overdue, the balance was distributed as required by the trust.

Prior to this transaction and unbeknownst to the beneficiaries (as annual accountings were not provided), Ms. Imai individually and through an affiliated entity had already collected \$42,625 in fees, \$27,625 in bookkeeping, tax preparation and accounting fees and an executor fee of \$15,000. See Exhibit A to Declaration. Now, Petitioner wants more and believes that it is reasonable to collect additional trustee fees and bookkeeping costs of \$40,478.88, even after the transition of trustees and distribution to beneficiaries of the trust assets as required by the trust.

The Court should deny this petition for the following reasons:

- 1. Notice was procedurally defective.** The petition should be denied or continued to afford the beneficiaries an opportunity to be heard;
- 2. Petitioner lacks standing.** A claim to establish a constructive trust can only be asserted by a trustee or beneficiary. Petitioner is not authorized to assert these claims. He was at no time a trustee or beneficiary and there is no foundational support in the petition that Mr. Smith is authorized to represent and administer claims on behalf of the past trustee. Even assuming arguendo that such authority exists, Ms. Imai nor her estate erve as trustee as authority has been transferred and assets distributed. Neither Mr. Smith nor the Estate of Cathy D. Imai remain trustees and have the requisite standing to assert these claims. See Probate Code §§ 16420(a) and 17200(a).
- 3. Petitioner's claims are untimely and stale. These claims are barred by the statute of limitations and the doctrine of laches.** Petitioner is seeking payment for trustee fees, accounting costs and bookkeeping costs for services rendered from 2005-2009. During said time, the trustee and an affiliated entity were regularly paid by the trust for bookkeeping, accounting, tax preparation and executor fees in an amount totaling \$42,625.00. While 4-8 years have passed since delivery of these services, Peititioner is improperly seeking to collect additional sums for fees and costs allegedly earned from 2005-2009. Even assuming arguendo a four year statute (CCP §337), this claim and demand is stale and untimely.

SEE ADDITIONAL PAGES

4. PETITIONER HAS PREVIOUSLY LITIGATED AND DIMSISSED THE CLAIMS. SEE REQUEST FOR JUDICIAL NOTICE AND FRESNO COUNTY SUPERIOR COURT CASE NUMBER 12CECG03404 DATED 5-2-13.

As discussed in the standing section above, Petitioner does not have standing to assert these claims by statute. At best, his stale claims would be tantamount to a creditor claim that would not constitute a probate dispute. Such claims have been previously asserted and litigated in a separate civil action. In the prior action, Petitioner sought to recover the same trustee fees against the successor trustees and beneficiaries. The claims against the successor trustees, individually and in their representative capacity, have been dismissed with prejudice. Petitioner should not now be permitted to reassert and re-litigate these issues as a probate matter.

5. PETITIONER'S ADDITIONAL FEE REQUESTS ARE NOT SUPPORTED OR REASONABLE. Beyond the \$42,625 already collected by Ms. Imai and her affiliated entities, Petitioner somehow contends he is entitled to receive an additional \$42,978 in trustee and bookkeeping fees as reasonable compensation for trustee services. Petitioner has failed to offer supporting evidence to justify these additional fees, such as timesheets and records to legitimize this hefty claim. Rather, he elected to simply reference general areas of work performed. As previously noted, Ms. Imai or her affiliates have been well compensated in the past for these services. Lacking supporting evidence, Petitioner seeks to inflate these fees by calculating a sum based on a percentage of trust assets, and utilizes the rate structure set forth in Probate Code § 10800 to generate a fee. What results is an exaggerated fee, a four (4) times multiplier on what a personal representative would generally be paid. There is no evidence to justify and support such extravagant compensation and Petitioner fails to offset all compensation.

For the reasons above, the trustee has been paid reasonable compensation and there are no additional fees to be confirmed or awarded. Objector Susette Ishizuka respectfully requests the Court deny the petition and requests fees and costs relating to this petition and such other relief as the Court may deem proper.

Objection filed 12-3-13 by beneficiaries Faith Ishizuka and Stephanie Ishizuka denies that Ms. Imai was not paid and that the amount calculated is owing. Objectors object to the accounting covering the period of December 2004 through October 2010 and state the fees claimed are unreasonable and excessive as the calculation method is the method used for personal representatives exceeds what is reasonable in a trust, and are not substantiated by itemization, etc. The accounting shows payments in excess of \$27,000 over the six years for income tax preparation, and there is no itemization in this request.

If Ms. Imai did, in fact, prepare the returns, then the above-noted expenditure for tax preparation fees should be explained and/or disallowed. There is no explanation as to the identity of "J. Takano," listed as a recipient of a trust distribution in the amount of \$3,744.79, despite the fact that there does not appear to be a "J. Takano" listed as a beneficiary.

Objectors pray for an order that the petition not be granted as filed, that the petitioner be ordered forthwith to render a true, correct and legally sufficient verified account; for costs of suit incurred herein; and for such other and further relief as to the court seems just and proper in the premises.

DOD: 10/15/2007		<p>JAMES RONNIE MERCER, surviving spouse is petitioner.</p> <p>No other proceedings.</p> <p>Decedent died intestate.</p> <p>Petitioner requests Court determination that decedent's ¼ interest of the property located at 901 S. 2nd Street, Kernan, Ca. and decedent' ½ interest of the property located at 15452 W. "A" St. Kernan, Ca. pass to the petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Petition does not set forth enough facts for the Court to determine that it is indeed community property. Need Attachment 7 setting forth the following:</p> <ul style="list-style-type: none"> a. The date the petitioner and decedent were married. b. The date the property was acquired. c. That all the property the petitioner is asking to pass was acquired during the marriage using community property funds and was not received by gift, devise or bequest. 	
Cont. from				
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<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			
		<p>Reviewed by: LV</p> <p>Reviewed on: 12/09/2013</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 8 – Mercer</p>		

DOD: 7-9-10	<p>LYNETTE LUCILLE DUSTON and WARREN LESLIE DAVIS filed Second Amended Petition for: (1) Removal of Mary M. Davis as Executor of the Estate; (2) Compelling Account and Report of Administration of Estate; (3) Appointment of Lynette Lucille Duston and Warren Leslie Davis as Successor Co-Executors of Estate.</p> <p>MARY M. DAVIS, Executor, filed Amended First and Final Account and Report of Executor and Amendment to Petition for its Settlement, for Allowance of Ordinary Executor Commissions, Ordinary and Extraordinary Attorneys' Fees and for Final Distribution.</p> <p>At settlement conference on 10-29-13, the parties reached complete resolution of all claims known and unknown. Upon inquiry by the Court, each party individually agreed to the terms and conditions of the settlement. Counsel was directed to prepare the necessary documents.</p> <p>The Court set status hearing re settlement agreement for 11-18-13.</p> <p>On 11-18-13, the Court was advised that the documents were being circulated. The Court set this status hearing Re: Second Account and All Pending Matters.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Settlement Agreement. 2. Need Order for Final Distribution.
Aff.Sub.Wit.		
Verified		
Inventory		
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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: 12-9-13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 9 – Davis</p>	

10 **Isaiah Vara Gonzales & Heavens Vara (GUARD/P) Case No. 00CEPR10433**

Atty **Vara, Jose C. (pro per – maternal grandfather/Petitioner)**

Atty **Vara, Ramona (pro per – maternal grandmother/Petitioner)**

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

Isaiah, 14	<u>TEMPORARY EXPIRES 12/10/13</u>	NEEDS/PROBLEMS/COMMENTS:
Heavens, 7	JOSE VARA and RAMONA VARA , maternal grandparents, are Petitioners.	This Petition pertains to Heavens Vara only. Petitioners were appointed as guardians of Isaiah on 11/30/2000.
	Father: UNKNOWN – <i>Declaration of Due Diligence filed 11/01/13*</i>	1. Need proof of service at least 15 years before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> or <i>Consent & Waiver of Notice</i> or <i>Declaration of Due Diligence</i> for:
Cont. from	Mother: JOSEPHINA VARA SANCHEZ – <i>Personally served on 10/14/13</i>	- Father (unknown) – Personal service required, unless diligence is found.
<input type="checkbox"/> Aff.Sub.Wit.	Paternal grandfather: UNKNOWN Paternal grandmother: UNKNOWN	*Declaration of Due Diligence filed 11/01/13 states that the father has never been involved with the minor and his whereabouts are unknown. <u>The Declaration of Due Diligence is not signed/verified.</u>
<input checked="" type="checkbox"/> Verified	Petitioners state that Heavens has lived with them since birth. CPS recently was involved with the mother and have placed some of the mother's other children with them. Mother is currently in drug rehab. The father is unknown and has never been in the minor's life.	- Paternal grandparents (unknown) – Service by mail sufficient.
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
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<input checked="" type="checkbox"/> Notice of Hrg	Court Investigator Jennifer Daniel filed a report on 12/04/13.	
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<input checked="" type="checkbox"/> CI Report		
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<input type="checkbox"/> Citation		
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		Reviewed by: JF
		Reviewed on: 12/09/13
		Updates:
		Recommendation:
		File 10 – Vara

Pro Per Bautista, Felipe (Pro Per Petitioner, father)

Petition for Visitation

Age: 8 years	FELIPE BAUTISTA, father, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Notes:</u></p> <ul style="list-style-type: none"> Father's visitation rights were terminated by the Court on 9/30/2013 (please refer to notes at center.) Guardian Maria Bautista was assisted by Elizabeth Bautista interpreting to her in the Spanish language at the last hearing. <p>1. Need <i>Notice of Hearing</i> and proof of service of the notice for:</p> <ol style="list-style-type: none"> Maria Bautista, Guardian; Vanessa Nicole Noriega, mother; Antonio Bautista, paternal grandfather; Victor Manuel Noriega, maternal grandfather; Kathy Ann Noriega, maternal grandmother. <p>Note: Previous visitation per Minute Order dated 5/8/2012 was: Father shall have no unsupervised visits with the child. Visitation with father shall be supervised by either the paternal grandfather or the paternal step-grandmother. There shall be no unsupervised visits around the father's wife.</p>
	MARIA BAUTISTA, paternal grandmother, was appointed Guardian on 5/8/2006.	
	Father: FELIPE E. BAUTISTA Mother: VANESSA NICOLE NORIEGA	
Cont. from	Paternal grandfather: Antonio Bautista. <i>Deceased.</i>	
Aff.Sub.Wit.	Maternal grandfather: Victor Manuel Noriega Maternal Grandmother: Kathy Ann Noriega	
✓ Verified	Petitioner states he would like his visits back. Petitioner states he was not served the right way, and didn't have the right Court date. Petitioner states he is the father and his son wants to see him, and he would like to see his son, too. Petitioner states he loves his son and he wants their relationship back.	
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	x	
Aff.Mail	x	
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Pers.Serv.		
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Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202 Order	<p>Notes for background:</p> <ul style="list-style-type: none"> Guardian MARIA BAUTISTA filed on 8/27 2013 a petition for modification of the 5/8/2012 visits, requesting that father's visits be supervised for the minor's own protection. Guardian stated the minor informed her that his father's wife hits him and mistreats him, and that his father hits him with the belt for no reason. The minor informed the Guardian that he is afraid to go to the father's house because his father and the wife argue all of the time, and the father does not comply with the Court order regarding no unsupervised visits around his wife. Minute Order dated 9/30/2013 from the hearing on the Guardian's petition for modification of the father's visits states in pertinent part: The Court finds that actual notice has been given to mother and father, and the paternal grandfather is deceased. The Court further finds that the terms of the previous order were violated and it is in the best interest of the child to terminate father's visits until further order of the Court. Father's visits are terminated. The Guardian is advised that she may authorize visits if deemed appropriate and safe for the child. 	
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	Reviewed by: LEG	
	Reviewed on: 12/9/13	
	Updates:	
	Recommendation:	
	File 11 – Bautista	

Atty Williams, Jasmine T. (pro per – mother/Petitioner)
 Petition for Termination of Guardianship

Xazavier, 14 Cont. from 100813, 102913 <table border="1" style="width: 100%;"> <tr><td>Aff.Sub.Wit.</td><td></td></tr> <tr><td>✓ Verified</td><td></td></tr> <tr><td>Inventory</td><td></td></tr> <tr><td>PTC</td><td></td></tr> <tr><td>Not.Cred.</td><td></td></tr> <tr><td>Notice of Hrg</td><td>x</td></tr> <tr><td>Aff.Mail</td><td>x</td></tr> <tr><td>Aff.Pub.</td><td></td></tr> <tr><td>Sp.Ntc.</td><td></td></tr> <tr><td>Pers.Serv.</td><td></td></tr> <tr><td>Conf. Screen</td><td></td></tr> <tr><td>Letters</td><td></td></tr> <tr><td>Duties/Supp</td><td></td></tr> <tr><td>Objections</td><td></td></tr> <tr><td>Video Receipt</td><td></td></tr> <tr><td>✓ CI Report</td><td></td></tr> <tr><td>9202</td><td></td></tr> <tr><td>✓ Order</td><td></td></tr> <tr><td>Aff. Posting</td><td></td></tr> <tr><td>Status Rpt</td><td></td></tr> <tr><td>UCCJEA</td><td></td></tr> <tr><td>Citation</td><td></td></tr> <tr><td>FTB Notice</td><td></td></tr> </table>	Aff.Sub.Wit.		✓ Verified		Inventory		PTC		Not.Cred.		Notice of Hrg	x	Aff.Mail	x	Aff.Pub.		Sp.Ntc.		Pers.Serv.		Conf. Screen		Letters		Duties/Supp		Objections		Video Receipt		✓ CI Report		9202		✓ Order		Aff. Posting		Status Rpt		UCCJEA		Citation		FTB Notice		JASMINE WILLIAMS, mother, is Petitioner. GENICE WHITTLE, paternal grandmother, was appointed guardian on 06/11/12. Father: DARRELL RICHARDSON Paternal grandfather: UNKNOWN Maternal grandfather: GEORGE WILLIAMS Maternal grandmother: DECEASED Petitioner requests that the guardianship be terminated so that Xazavier can have a stable, loving home with her where he won't run away or be picked on. Court Investigator Dina Calvillo filed a report on 10/02/13.	NEEDS/PROBLEMS/COMMENTS: This Petition pertains to Xazavier only. Maria is now 18 years old. <u>CONTINUED FROM 10/29/13</u> Minute Order from 10/29/13 states: Ms. Williams is appearing via CourtCall. Ms. Williams is directed to provide notice to the appropriate parties. Matter is continued to 12/10/13. The guardian is directed to be present with Xazavier at the next hearing. As of 12/09/13, nothing further has been filed and the following notes remain: 1. Need Notice of Hearing. 2. Need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Termination of Guardianship or Consent & Waiver of Notice or Declaration of Due Diligence for: - Genice Whittle (paternal grandmother) - Darrell Richardson (father) - Paternal grandfather (unknown) - George Williams (maternal grandfather) - Xazavier Williams (minor) - Maria Williams-Richardson (sibling) - Maurice Richardson (sibling)
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		File 12 – Williams - Richardson																																														

Age: 3		<p align="center"><u>TEMPORARY EXPIRES 12/10/2013</u></p> <p>JEANETTE ORTEGA, maternal grandmother, is Petitioner.</p> <p>Father: DONNY BARNs</p> <p>Mother: VANITY SUAREZ</p> <p>Paternal grandparents: NOT LISTED</p> <p>Maternal grandfather: NOT LISTED</p> <p>Petitioner states that she was previously appointed temporary guardian, but missed the hearing for the permanent guardianship. She states that the mother is on drugs. She states the child has been residing with her off and on since birth and she is provided a stable drug-free home, she has her own room and is in a Head Start Program.</p> <p>Court Investigator Jo Ann Morris' report filed 11/07/2013.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 11/19/2013: The Court directs the Petition to file a declaration of due diligence as to the mother.</p> <p>Minute Order of 10/01/2013: Ms. Ortega is advised that the father will need to be personally served. Ms. Ortega informs the Court that she is currently attending AA meetings four times per week. The CI is ordered to meet with Ms. Ortega to obtain the name of her sponsor. Based on Ms. Ortega's representation that she is currently attending AA meetings; has obtained a three bedroom residence, and CPS is looking to place the new baby in her care, the Court grants the petition.</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. 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 or declaration of due diligence for: <ul style="list-style-type: none"> • Donny Barns (Father) • Vanity Suarez (Mother) 3. Need proof 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: <ul style="list-style-type: none"> • Paternal Grandparents (Not Listed) • Maternal Grandfather (Not Listed) 4. A Declaration of Due Diligence was filed on 09/17/2013 however it is unclear who it pertains to as the handwriting is illegible.
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<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
Reviewed by: LV			
Reviewed on: 12/09/2013			
Updates:			
Recommendation:			
File 13 – Barns			

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

Bradley, 7	TEMPORARY EXPIRES 12/10/13	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of personal service of <i>Notice of Hearing</i> with a copy of the <i>Guardianship Petition</i> at least 15 days before the hearing <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: <ol style="list-style-type: none"> a. Bobbie Perez (father) b. Brandi Perez (mother) 3. Need proof service of Notice of Hearing with a copy of the <i>Guardianship Petition</i> at least 15 days before the hearing or Consent & Waiver of Notice or Declaration of Due Diligence for: <ol style="list-style-type: none"> a. Dan Perez (Paternal Grandfather) b. Linda Perez (Paternal Grandmother) c. Daniel Wineland (Maternal Grandfather)
Bryton, 10 months	<p>LORI WINELAND, maternal grandmother, is Petitioner.</p> <p>Father: BOBBIE PEREZ Mother: BRANDI PEREZ</p> <p>Paternal grandfather: DAN PEREZ Paternal grandmother: LINDA PEREZ</p> <p>Maternal grandfather: DANIEL WINELAND</p> <p>Petitioner states that the children have lived with her since birth. Their mother has a significant drug addiction and left the home 2 weeks ago. They have not heard from her or been able to reach her since she left. Their father has not been involved in the children's lives and Petitioner believes he is living somewhere up north growing marijuana.</p> <p>Court Investigator Samantha D. Henson's report filed 12/03/2013.</p>	
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FTB Notice		
		Reviewed by: LV
		Reviewed on: 12/09/2013
		Updates:
		Recommendation:
		File 14 – Perez

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

Age: 9		<p><u>NO TEMPORARY REQUESTED</u></p> <p>JANET LYNN MOORE, maternal grandmother is petitioner.</p> <p>Father: CHRISTOPHER DAVID PACKER, Consents and Waives Notice</p> <p>Mother: SUSAN GALE MORRIS, Consents and Waives Notice</p> <p>Paternal Grandfather: Deceased Paternal Grandmother: Robin Renee Davidson, Consents and Waives Notice</p> <p>Maternal Grandfather: Brian Dale Morris, Consents and Waives Notice</p> <p>Petitioner states: the minor has resided with the petitioner since she was 8 months old, she is now 9. Her mother was on drugs and neglecting her so petitioner brought the child to her home thinking the mother would get clean, however, more trouble came. Since then the mother has completed a program at Evangel Home. When she left there approximately two years ago she took up residency with a registered sex offender with child under 14 and she intends to marry him. Petitioner feels the child deserves a stable home environment, not around sex offender.</p> <p>Court Investigator Jennifer Daniel's report filed 12/03/2013.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
Cont. from				
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<input type="checkbox"/>	FTB Notice			
		<p>Reviewed by: LV</p> <p>Reviewed on: 12/09/2013</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 15 – Packer</p>		

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Age: 4		<u>GENERAL HEARING 01/27/14</u>		NEEDS/PROBLEMS/COMMENTS:	
		LEONARDA SOTO, paternal grandmother, is Petitioner.		1. Need proof of personal service of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: <ol style="list-style-type: none"> a. Ceasar Soto (father)* - Proof of service by mail filed 11/27/13 is insufficient. Personal service required and the Proof of service does not indicate that a copy of the <i>Petition</i> was mailed with the Notice of Hearing. b. Yoana Delgadillo (mother) 	
		Father: CEASAR J. SOTO – Served by mail on 11/27/13			
Cont. from		Mother: YOANA ALVAREZ DELGADILLO			
	Aff.Sub.Wit.	Paternal grandfather: MANUEL SOTO GARCIA – Served by mail on 11/27/13			
✓	Verified	Maternal grandfather: UNKNOWN			
	Inventory	Maternal grandmother: CLAUDIA DELGADILLO			
	PTC	Petitioner states the parents are both in Mexico. The mother has drug abuse issues and the father was deported. Petitioner states that the child was in Mexico also but came back with her great grandmother. The great grandmother has now returned to Mexico and the child has lived with Petitioner and also been visiting with her maternal aunt. Petitioner alleges that the maternal aunt has several people living in her small 2 bedroom apartment and there is no space for the minor. Petitioner requests temporary guardianship so that she can provide consistency in the child's life.			
	Not.Cred.				
✓	Notice of Hrg				
✓	Aff.Mail	w/o			
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.	x			
	Conf. Screen	x			
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
				Reviewed by: JF	
				Reviewed on: 12/09/13	
				Updates:	
				Recommendation:	
				File 16 – Soto	

Petition for Appointment of Temporary Conservator of the Person (Prob. C. 2250)

Age: 75 years	<u>GENERAL HEARING 1/14/2014</u>		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of personal service of the Notice of Hearing along with a copy of the temporary petition on:</p> <p style="padding-left: 20px;">a. Martha Elizabeth Patrick (proposed conservatee)</p> <p>Court Investigator Samantha Henson to provide:</p> <p>1. Advisement of Rights 2. Court Investigator's Report</p>
	<p>DONNA M. RAMIREZ-BAKER, daughter is petitioner and requests appointment as temporary conservator of the person.</p>		
Cont. from	<p>Petitioner states a temporary conservator is needed to provide for her temporary care, maintenance and support. The proposed conservatee has a diagnosis of dementia. She is combative and uncooperative. According to her doctor she need psychotropic medications to control her agitation and psychotic symptoms. Her social worker advised petitioner to seek a conservatorship so that she can secure the Medicaid benefit the proposed conservatee needs to allow her to remain in her care facility.</p>		
Aff.Sub.Wit.			
✓ Verified			
Inventory			
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✓ Notice of Hrg			
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✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
✓ Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: KT			
Reviewed on: 12/9/13			
Updates:			
Recommendation:			
File 17 – Patrick			