



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 and Final Account and Report of Trustee; Petition for Allowance of Compensation to Trustee and Attorney; Termination of Trust; and Distribution

		PUBLIC GUARDIAN , Successor Trustee, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from		This petition relates to the GRANDCHILDREN'S TRUST CREATED UNDER THE MABEL P. LUNSTROM LIVING TRUST , for the benefit of Signe Lundstrom.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory	Account period: 8/1/12 – 9/18/14	
<input type="checkbox"/>	PTC	Accounting - \$27,062.34	
<input type="checkbox"/>	Not.Cred.	Beginning POH - \$27,048.74	
<input checked="" type="checkbox"/>	Notice of Hrg	Ending POH - \$ 2,769.71	
<input checked="" type="checkbox"/>	Aff.Mail	Trustee - \$1,064.32 (7.92 Deputy hours @ \$96/hr and 4.00 Staff hours @ \$76/hr)	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.	Attorney - \$1,000.00	
<input type="checkbox"/>	Pers.Serv.	Bond - \$50.00 (o.k.)	
<input type="checkbox"/>	Conf. Screen	Costs - \$435.00 (filing fee)	
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections	Petitioner states that during the administration of the grandchildren's trust, the court-approved distributions made on Signe's behalf. As a result, the funds have been mostly exhausted and petitioner asserts that the remaining assets (\$220.39 after payment of commissions, fees and costs) could be distributed to Signe and this trust terminated.	
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 12/2/14
			Updates:
			Recommendation:
			File 1 - Lundstrom

DOD: 01/21/2010	DOUGLAS J. GEIST , was appointed Administrator with full IAEA authority with bond set at \$400,000.00 on 05/04/2010.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 09/10/2014: Mr. Shekoyan informs the Court he is having issues contacting counsel.</p> <ol style="list-style-type: none"> 1. Need Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties
	Letters issued on 05/20/2010.	
Cont. from 062014, 091014	Inventory and Appraisal filed on 08/06/2010 shows an estate valued at \$333,944.84 .	
Aff.Sub.Wit.	Order Settling First Account and Report of Personal Representative filed 07/03/2013.	
Verified	Minute Order of 07/03/2013 set this matter for Status Hearing. Bond reduced to \$55,000.00.	
Inventory	Former Status Report filed on 09/04/2014 by Attorney James E. Shekoyan states this estate is the beneficiary of the Estate of Marilyn Alice Geist (San Francisco County Superior Court Case No. PES-07-290788). The Estate of Marilyn Alice Geist was distributed in June 2012 reserving closing costs. Since that time, Petitioner and Petitioner's attorney have repeatedly attempted to contact Petitioner's attorney in the San Francisco case, Kathy Murphy, requesting that the estate be closed and Petitioner's bond in that estate be discharged.	
PTC	In May 2014, Petitioner's attorney spoke with Ms. Murphy. Ms. Murphy indicated that there was a tax problem with the estate and that she would resolve the issue shortly. As of this date, neither Petitioner nor his attorney have heard from Ms. Murphy. On 08/28/2014, Petitioner's attorney sent Ms. Murphy a letter requesting the distribution from the Marilyn Geist Estate. A copy of the letter is attached. Ms. Murphy has not yet responded to the letter.	
Not.Cred.	In light of the foregoing, Petitioner requests a continuance of this status hearing for at least two months to allow Ms. Murphy to resolve the tax issue, distribute the balance of the funds, and discharge Petitioner's bond in that estate.	
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Atty Lederman, Gregory J., sole practitioner of Woodland Hills (for Petitioner Comerica Bank & Trust, Trustee)

Third Account and Report of Trustee and Petition for: Ratification of Trustee Fees, Allowance of Periodic Payment of Trustee Fees and Attorney's Fees and Reimbursement of Costs Advanced

Age: 11 years	COMERICA BANK & TRUST, N.A. , Trustee, is Petitioner.		NEEDS/PROBLEMS/COMMENTS: ~Please see additional page~
	Account period: 7/10/2013 through 8/31/2014		
	Accounting	- \$1,139,214.03	
	Beginning POH	- \$ 997,861.07	
	Ending POH	- \$1,036,406.95	
Cont. from	<i>(stocks/funds/securities, 2013 vehicle and \$48,617.53 cash)</i>		
<input type="checkbox"/> Aff.Sub.Wit.	Trustee	- \$8,098.24 (paid)	
<input checked="" type="checkbox"/> Verified	<i>(per authorized fee schedule @ 0.65% on the first \$1,000,000 of assets, 0.57 on next \$1,000,000 of assets; \$3,000 annual min.;</i>		
<input type="checkbox"/> Inventory	Caregiver Fees	- \$37,207.15 (paid)	
<input type="checkbox"/> PTC	<i>(per Order on Petition Requesting Hiring of a Caregiver filed 11/9/2011, copy attached as Exhibit D, authorizing \$2,000.00 per month paid bi-weekly to SHELLY WHITMIRE from 7/22/2013 to 8/28/2014;)</i>		
<input type="checkbox"/> Not.Cred.	Attorney	- \$5,035.00	
<input checked="" type="checkbox"/> Notice of Hrg	<i>(per Exhibit G and Declaration of Gregory J. Lederman in Support of Request for Attorney's Fees attached as Exhibit H; for 22.45 hours @ rates from \$150.00/hour to \$295.00/hour;)</i>		
<input checked="" type="checkbox"/> Aff.Mail	Attorney Costs	- \$372.00	
<input type="checkbox"/> Aff.Pub.	<i>(per Exhibit G for Courtcall and filing fee)</i>		
<input type="checkbox"/> Sp.Ntc.	Investment Manager	- \$11,289.07 (paid)	
<input type="checkbox"/> Pers.Serv.	<i>(paid to Morgan Stanley; per Declaration [of Claudia Shoemann] Regarding Payment of Investment Management Fees attached as Exhibit E; Petitioner contracts with outside investment managers for services; rates have been reduced from normal rates; during account period realized gain of \$49,317.84; [losses were \$14,621.62];)</i>		
<input type="checkbox"/> Conf. Screen	Vehicle Expenses	- [\$49,050.28] (paid)	
<input type="checkbox"/> Letters	<i>(rental of vehicle to transport HAILIE WHITMIRE totaling \$1,955.00; purchase of vehicle per Order on Petition Requesting Purchase of Automobile filed 9/10/2013 totaling \$44,970.75 ; car insurance premiums (\$1,753.53) and registration (\$371.00);)</i>		
<input type="checkbox"/> Duties/Supp	Medical Supplies	- \$4,900.00 (paid)	
<input type="checkbox"/> Objections	<i>(monthly payments to SHELLY WHITMIRE @ \$350.00 per month;)</i>		
<input type="checkbox"/> Video Receipt	Tutoring Fees	- \$10,717.50 (paid)	
<input type="checkbox"/> CI Report	<i>(paid to DANIELLE MULLET @ varying rates from \$360.00 to \$375.00 every ~two weeks from 7/10/2013 to 8/26/2014;)</i>		
<input checked="" type="checkbox"/> 2620	~Please see additional page~		
<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: LEG
			Reviewed on: 12/3/14
			Updates:
			Recommendation:
			File 3 – Whitmire

Petitioner states:

- On 4/28/2011, this Court approved the *Petition for Authority to Create a Special Needs Trust* for, which contains the terms of the special needs trust (SNT) created for the benefit of **HAILIE WHITMIRE**, who received monies from a global settlement reached in the class action litigation known as the Paxil birth defect cases (*copy of Trust attached as Exhibit A*);
- Petitioner as Trustee has managed and administered the entire Trust estate for the sole beneficiary, Hailie, and has served as acting Trustee at all times since initial appointment;
- On 11/9/2011, this Court issued an *Order on Petition Requesting Hiring of a Caregiver* (*copy attached as Exhibit D*) authorizing payments to **SHELLY WHITMIRE**, mother, of **\$2,000.00** per month, which she received twice a month, and the remainder of each payment was made for social security taxes, Medicare taxes, workers' compensation coverage, and administrative fees for the payroll company used by Petitioner;
- During the Third Account period, various disbursements were made for a rental vehicle used to transport Hailie to and from appointments as her father used the family's only functional vehicle to get to and from work; Petitioner requested authority from this Court to purchase a vehicle that would meet Hailie's needs to do away with the constant need to rent another vehicle; the *Order on Petition Requesting Purchase of Automobile* filed 9/10/2013 (*copy attached as exhibit F*) approved the request and a vehicle was purchased on 8/29/2013 for the total sum of **\$44,970.75**; as the Petitioner was authorized to purchase a vehicle for the benefit of the SNT beneficiary, the Trust made payments for car insurance and DMV registration;
- Pursuant to the *Order on Second Account and Report of Trustee* [filed 9/20/2013] the Trustee was authorized to take periodic fees on a monthly basis pursuant to the fee schedule [*please refer to Paragraph 11, lines 19 to 22 of Petition*].

Petitioner prays for an order:

1. Approving, allowing, and settling the Third Account;
2. Ratifying Trustee's fees paid to **COMERICA BANK & TRUST** totaling **\$8,098.24** during the Third Account period;
3. Authorizing and directing Petitioner to pay Comerica Bank & Trust N.A., out of the Trust estate periodic Trustee's fees on a monthly basis pursuant to Probate Code § 15682, based on the same fee schedule adhered to during the instant Third Account period;
4. Authorizing and directing Petitioner to pay attorney's fees of **\$5,035.00**, which per the *Declaration of Gregory J. Lederman in Support of Request for Attorney's Fees* attached as *Exhibit H* includes **2.50** hours of anticipated time @ **\$295.00** per hour (totaling **\$737.50**) for telephonic appearance at the 12/10/2014 hearing; or in the alternative, if the matter is recommended for approval and no appearance at hearing is required, the fee should be reduced by **\$737.50** and the total attorney fee request would be **\$4,297.50**; and
5. Authorizing and directing Petitioner to reimburse the Attorney's costs advance on behalf of the Trustee and Trust estate of **\$372.00**.

NEEDS/PROBLEMS/COMMENTS, continued:

1. *Order on Second Account and Report of Trustee* filed 9/20/2013 finds that Petitioner's Third Account, and all subsequent accountings thereafter, shall contain a declaration setting forth all services performed by **COMERICA BANK & TRUST** and the time spent performing each service. Need declaration from Petitioner as Trustee containing the itemization of services and time spent performing services, as ordered by this Court on 9/20/2013.

~Please see additional page~

NEEDS/PROBLEMS/COMMENTS, continued:

2. *Order on Second Account and Report of Trustee* filed 9/20/2013 finds that Petitioner's Third Account, and all subsequent accountings thereafter, shall contain the fee schedule of **MORGAN STANLEY** or any other outside investment management company hired by Petitioner. Paragraph 10(a)(ii) of the *Petition* states Petitioner used an outside investment manager to invest some of the SNT funds and paid a total of **\$11,289.07** as compensation for the investment management services. *Declaration [of Claudia Shoemann] Regarding Payment of Investment Management Fees attached as Exhibit E* does not but should provide the fee schedule in support of the investment management fees paid to the outside investment manager used by Petitioner during the Third Account period, as ordered by this Court on 9/20/2013. *Declaration [of Claudia Shoemann]* states Petitioner acts solely as a Trustee and is not a money management or investment company, that Petitioner contracts with outside investment managers for services to property invest some of the Trust's funds, and that to accommodate this agreement, both companies have reduced the rates they normally charge for the services they respectively provide. The *Declaration [of Claudia Shoemann]* does not appear to satisfy the requirements of this Court's order requesting a fee schedule as no rates or the services performed are included.
3. *Schedule C, Disbursements* does not show the payment for purchase of the vehicle. *Proof of Security Interest* filed 9/26/2013 includes a Certificate of Title dated 9/21/2013, which date falls within the instant account period of 7/10/2013 through 8/31/2014, such that the purchase should be reflected on the disbursement schedule.
4. *Schedule C, Disbursements* shows **\$10,717.50** was paid to **DANIELLE MULLET** for tutoring fees. Given the significant sum paid for this service, which by comparison exceeds Trustee fees and the requested Attorney fees during this account period, the Court may require specific information from Petitioner regarding the benefit the SNT Beneficiary is receiving from the tutoring by Danielle Mullet for the Court's consideration before ratifying this large expenditure made during the Third Account period.
5. *Schedule C, Disbursements* shows payment of **\$400.00** on 12/6/2013 to **SHELLY WHITMIRE** for Christmas expenses, without explaining how this disbursement relates to the special needs of the SNT Beneficiary.
6. Need proposed order pursuant to Local Rule 7.1 which provides a proposed order shall be submitted with all pleadings that request relief.

Note: Court will set a status hearing as follows:

- **Monday, November 2, 2015 at 9:00 a.m. in Dept. 303** for the filing of the fourth account.

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

(1) First and Final Account and Report of Administrator and Petition for its Settlement, (2) for Allowance of Statutory Commissions and (3) for Final Distribution

DOD: 05/15/09	PUBLIC ADMINISTRATOR , Administrator with will annexed, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 05/15/09 – 09/30/14	
Conf. from	Accounting - \$47,349.48	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$47,349.48	
<input checked="" type="checkbox"/> Verified	Ending POH - \$25,289.53 (all cash)	
<input checked="" type="checkbox"/> Inventory		
<input checked="" type="checkbox"/> PTC	Administrator (statutory) - \$1,893.97	
<input checked="" type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Attorney (statutory) - \$1,893.97	
<input checked="" type="checkbox"/> Aff.Mail w/o		
<input type="checkbox"/> Aff.Pub.	Costs - \$1,200.00 (filing fees, certified copies, publication)	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	Closing - \$248.00	
<input type="checkbox"/> Letters 05/16/11	Distribution, pursuant to decedent's will, is to:	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections	Kristin Cappelli - \$10,026.80	
<input type="checkbox"/> Video Receipt	Michael Kitley - \$10,026.79 (\$2,058.30 to be paid to CA Victim's Compensation Board and \$7,968.49 to Michael Kitley)	
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input checked="" type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 12/03/14
		Updates:
		Recommendation: SUBMITTED
		File 4 – Kitley

Order to Show Cause Re: Failure to Appear and Failure to File the First Account or Petition for Final Distribution

DOD: 05/29/2009	DALE GEORGE MELL , son, was appointed Executor with full IAEA authority with bond set at \$85,000.00 on 10/19/2013.	NEEDS/PROBLEMS /COMMENTS: 1. Need payment in the amount of \$800.00 for sanctions imposed on Dale G. Mell, Executor – if not vacated by the court.
Cont. from	Minute Order of 09/16/2014: The Court issues Order to Show Cause with Sanctions of \$800 to Dale G. Mell for failure to perform duties. Counsel will notify Bond Company of Issues.	
Aff.Sub.Wit.	Notice of Order to Show Cause was mailed to Dale G. Mell on 09/19/2014.	
Verified		
Inventory		
PTC		
Not.Cred.	Minute Order dated 11/3/14 states Mr. Krbechek requests a continuance with removal of the sanctions if the documents are filed. The court grants the request and continues the matter to 11/14/14.	
Notice of Hrg		
Aff.Mail	Minute Order dated 11/14/14 states the Court Issues an Order to Show Cause to Randolph Krbechek and Dale Mell as to why Mr. Mell should not be removed as Executor for failure to appear to file the First Account or Petition for Final Distribution; Mr. Krbechek and Mr. Mell are ordered to be personally present in court on 12/10/14. Furthermore, the Court orders that the \$800.00 sanctions be paid by Mr. Mell no later than 11/24/14.	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections	Declaration of Randolph Krbechek filed on 11/18/14 states he and Mr. Mell were present in court on 11/3/14. He states he informed the court that he had received the necessary documents and would be able to file the petition for final distribution by Friday, 11/14/14.	
Video Receipt		
CI Report		
9202	Mr. Krbechek states he did not understand that the matter was set for a continued hearing on 11/14/14. The accounting was filed prior to noon on 11/14/14 and is set for hearing on 12/18/14. No sanctions should be imposed on Mr. Mell because he relied on Mr. Krbechek's advice. Mr. Krbechek states he was in court on 11/17/14 for a hearing on a different case. The court did not mention anything about the OSC in this estate.	
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice	Mr. Krbechek respectfully submits that he completed all requirements necessary to discharge the prior order regarding the filing of the account and petition for final distribution. Based thereon, Mr. Krbechek respectfully requests that the court vacate the probate minute order dated 11/14/14 or in the alternative continue this hearing to 12/18/14 to be heard with the petition for final distribution.	
		Reviewed by: KT
		Reviewed on: 12/3/14
		Updates:
		Recommendation:
		File 5 – Mell

Atty Cathy Amero and Gary Amero (Pro Per Guardians/paternal grandparents)

Atty Stegall, Nancy J (for Petitioner/mother Teresa Mathia)

Petition for Termination of Guardianship

Age: 6 years	TERESA MATHIA, mother, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 111214	CATHY AMERO and GARY AMERO , paternal grandmother and step grandfather, were appointed guardians after a court trial on 3/19/14.	
Aff.Sub.Wit.		
✓ Verified	AMANDAJAY MATHIA , biological paternal great-aunt, is the former temporary guardian.	
Inventory		
PTC		
Not.Cred.	Father: THOMAS BINGHAM-MATHIA	
✓ Notice of Hrg	Paternal grandfather: Douglas Bingham, Deceased	
✓ Aff.Mail	Paternal grandmother: Cathy Amero	
Aff.Pub.		
Sp.Ntc.	Maternal grandfather: Chad Jones	
Pers.Serv.	Maternal grandmother: Rebecca Jones	
Conf. Screen	Petitioner states she is a fit mother and able to competently care for Rachael.	
Letters	Petitioner states she consented to the guardianship when Rachael was to be cared for by her paternal great-aunt AmandaJoy Mathia. At the time of the appointment of AmandaJoy as temporary guardian, Petitioner states she had sole legal and physical custody. Her father had court-ordered supervised visitation.	
Duties/Supp		
Objections		
Video Receipt		
✓ CI Report		
9202		
✓ Order		
Aff. Posting	Racheal lived with AmandaJoy since October 2011. She was Rachael's court ordered temporary guardian from October 2012 through April 16, 2014.	
Status Rpt		
UCCJEA		
Citation		
FTB Notice	Please see additional page	
		Reviewed by: KT
		Reviewed on: 12/2/14
		Updates:
		Recommendation:
		File 6 – Bingham-Mathia

Petitioner states she voluntarily participated in extensive counseling with Jeanne Galbraith, M.S. LMFT. Before counseling she feels her past prevented her from being the mother Rachael needed. She now sees that her past does not define her and she can, and will be, a great mother.

In addition, Petitioner states she voluntarily started a 12 week parenting program through Fresno Family Counseling Center.

Petitioner states she has concerns regarding the current guardianship and Rachael's well-being in Arizona. Rachael has told her that she has been left unsupervised with her biological father, Thomas. Thomas should not be left unsupervised with Rachael, pursuant to the Court order. Thomas has supervised visits because of his molestation tendencies, including being molested by his older brother. Petitioner feels that Rachael will become a victim of molestation if left alone with Thomas.

Petitioner states that when Rachael came for a visit she noticed a bruise on her arm. When asked about it Rachael stated that Gary Amero grabbed her in anger. Petitioner states she immediately called the police and notified CPS. In addition to the possible physical abuse, Rachael endures frequent arguing and yelling at the Amero home.

Petitioner alleges Rachael suffers from asthma and is not being treated in Arizona.

Petitioner alleges the Amero's restrict Rachael's access to private phone calls with her.

Rachael is unhappy in Arizona. When she visits in California she begs to stay.

Court Investigator Julie Negrete's Report filed on 11/25/14

7A
Atty
Atty
Atty

Yvette C. Greenberg (CONS/P)

Bagdasarian, Gary G. (for Petitioners Stanley Greenberg and Cheryl Taylor)
Helon, Marvin (court appointed for the Conservatee) (previously Joanne Sanoian)
Amador, Catherine A. (for Objectors Nadine Walker and Michele Torres)

Case No. 13CEPR00137

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

		Temp Conservatorship extended to 10-30-14	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: On 10-28-14, Nadine Walker and Michele Torres, daughters of the proposed Conservatee, filed Objections to this petition and a competing petition for conservatorship of the person and estate. See Page B.</p> <p>Court Investigator advised rights on 3-19-13</p> <p><u>Voting rights are affected - Need minute order.</u></p> <p>Note: Petitioners, relatives, and attorneys Bagdasarian (for Petitioners) and Sanoian (for the proposed Conservatee) have met in mediation and reached agreement, in part, that conservatorship is in the proposed conservatee's best interest, but agreed to mediate further. Agreements dated 3-5-13 and 5-6-13 are in the file for reference.</p>
		STANLEY GREENBERG and CHERYL TAYLOR , Son and Daughter, are Petitioners and request appointment as Co-Conservators of the Person with medical consent powers and dementia medication and placement powers.	
Cont. from 032813, 052313, 080113, 091813, 103013, 103014		Voting rights affected	
<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.	W	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input checked="" type="checkbox"/>	Objections		
<input checked="" type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input checked="" type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		A second Capacity Declaration was filed 6-24-13.	
		Capacity Declaration was filed 2-26-13.	
		Petitioners state their mother suffers from advanced Alzheimer's Disease and dementia. She resides at a care facility in Fresno. Petitioners are agents under a Power of Attorney dated 12-5-06 and an Advance Health Care Directive dated 12-5-06. Two of the conservatee's other three children, Michele Torres of Gilroy and Nadine Walker of Fresno, claim the care the Conservatee is receiving at her current placement, Serenity Living Care, Inc., is not satisfactory and have threatened to remove her to a residence or some other facility. Petitioners have been made aware from speaking with their mother and staff that while the proposed Conservatee shows an interest in knowing about her personal residence, if she is moved, she may become very confused and agitated. The Conservatee is the settlor of a living trust in which her assets are located. Petitioner Stanley Greenberg is the trustee. Petitioners do not believe any movement is in the proposed conservatee's best interest and request upon appointment to obtain authorization to keep her in a living arrangement suited for her condition.	
		SEE ADDITIONAL PAGES	
		Reviewed by: skc	
		Reviewed on: 12-3-14	
		Updates:	
		Recommendation:	
		File 7A - Greenberg	

Page 2

Court Investigator Jennifer Young filed a report on 3-19-13.

Status Report filed 10-28-13 by Attorney Joanne Sanoian states that at mediation held on 10-16-13, the Temporary Conservators reached agreement for issue of an amended temporary order, subject to the Court's approval (attached).

The attached Stipulation for Amended Order states that the parties approve the Agreement and stipulate that the Agreement be incorporated into an amended Temporary conservatorship order.

The Probate Mediation Agreement includes the following terms:

- Stanley Greenberg will remain Temp Conservator for 12 months.
- Cheryl Taylor shall withdraw her petition to be Co-Conservator.
- At the end of the 12-month period, Stanley Greenberg will transition into the role of conservator.
- Yvette Greenberg shall dismiss her challenge to conservatorship at that time if appropriate.
- Yvette Greenberg shall transition her living placement to Nadine Walker's residence on 12-3-13, which will include in-home caregiving, with costs to be paid by Yvette Greenberg's trust.
- Parties will keep a journal about various items.
- Yvette may travel with any family member to their home outside Fresno County with 14 days written notice to Stanley and Nadine.
- All parties shall have access to Yvette's medical records.
- Stanley to retain advance health care directive.
- If circumstances warrant future care, Yvette shall be moved to Orchard Park or other facility by mutual agreement.

Note: Based on the terms of the settlement agreement, the Court may continue this petition / matter for one year to address permanent conservatorship at that time. If issues come up, a petition may be filed for sooner hearing date.

SEE ADDITIONAL PAGES

Page 3

On 10-28-14, Nadine Walker and Michele Torres, daughters of the proposed Conservatee, filed Objections to this petition and a competing petition for conservatorship of the person and estate that is set for hearing on 12-10-14.

Objectors state the petitioners have used Stanley Greenberg's existing power of attorney to:

- remove the proposed Conservatee from her residence and place her in a substandard care facility without informing her other children of her location or the reason for the move;
- Failed to provide important medical information to the proposed conservatee's children and have deliberately misled them into believing she would be returned home following a hospitalization for gallstone treatment;
- Isolated the proposed Conservatee from her other children and/or interfered with their ability to interact with her while in the care facility;
- Unreasonably interfered with the ability of Objector Nadine Walker to provide appropriate care for the proposed Conservatee during a mediated decision to move her to Ms. Walker's home;
- Interfered with retention of reliable in-home caregivers working with the proposed Conservatee in Ms. Walker's home;
- Attempted to impose unreasonable and medically unsupportable limits on the ability of the proposed conservatee's other children's efforts to have her participate in family events, such as the wedding of a grandson; and
- Proposed removal from Ms. Walker's home and transfer to the Alzheimer's unit of a large care facility, where she would receive less individual treatment and be isolated from family members much more than she is currently and potentially be negatively affected by the change of residence to an unfamiliar location.

Objectors state they and other interested persons, including David Greengberg, did NOT agree that Stanley Greenberg should transition to a permanent conservator. It is in the best interest of the Conservatee that NADINE WALKER be appointed as conservator of the person.

Objectors request that:

- 1. The petition of Stanley Greenberg and Cheryl Taylor be denied;**
- 2. Nadine Walker be appointed as conservator of the person of Yvette Greenberg; and**
- 3. Such other and further relief as the Court deems necessary and proper.**

Response to Objections filed 10-29-14 by Attorney Bagdasarian (not verified by Petitioner) states the objections are too late to permit entry of an order setting aside the Court's 11-14-13 order appointing Stanley as temporary conservator of Mrs. Greenberg pursuant to the agreement of the parties. Pursuant to the agreement, Stanley would be appointed as permanent conservator one year after entry of the order. The objections and petition are not proper procedure for seeking removal of Stanley as conservator. Stanley has priority for appointment by virtue of his antecedent nomination by Mrs. Greenberg. Probate Code §§2258 and 2651 provide a mechanism to challenge his actions as temporary or permanent conservator. He has not been given 15 days' notice of the hearing on their attempt to remove him. Mr. Greenberg requests appointment as conservator of the person.

Court Investigator Jennifer Young filed a supplemental report on 10-28-14.

Age: 81 years	DAVID N. WASHINGTON , Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Petitioner states the conservatee's husband, David Lee Baker ("Decedent"), died on 11/3/13. His estate is currently being administered in this Court. Pursuant to Decedent's Will, which was admitted to probate by order of this Court on 1/9/14, the conservatee is to receive certain items of property plus 1/5 of the residue of the decedent's estate.	
Cont. from	Earnest L. Baker, as the executor of the Decedent's estate, has proposed that the assets of the Decedent's estate be distributed in accordance with an Agreement for In-Kind Distribution ("Distribution Agreement"). The Distribution agreement provides that conservatee will receive cash and two parcels of real property as her 1/5 interest in the residual estate.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	W/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
	Petitioner believes that Distribution Agreement is in the best interest of the conservatee.	
	The conservatee currently receives approximately \$2,500.00 per month in income.	
	Petitioner believes that receipt of the property will result in an additional income stream of approximately \$1,400.00 per month. Petitioner estimates the expenses for the real property conservatee would receive would total approximately \$395.00 per month.	
	Petitioner believes that the proposed action will have no adverse effects on the conservatee's estate.	
	Wherefore Petitioner prays for an order authorizing Petitioner, as Conservator, to take the proposed action described above.	
		Reviewed by: KT
		Reviewed on: 12/3/14
		Updates:
		Recommendation:
		File 9 – Baker

Atty Durost, Linda K., sole practitioner (for Petitioner Janice Sharp, Successor Trustee)

Petition for Order Confirming Trust Assets [850(a)(3)]

DOD: 1/31/2013	CATHERINE JULIA MASON , daughter, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Petitioner states:	Continued from 11/18/2014.
	<ul style="list-style-type: none"> Petitioner is the acting Successor Trustee of the BETTY HORTON MASON LIVING TRUST as amended and restated on 8/6/2012 (copy of Trust attached as Exhibit 1); Prior to the death of Betty Horton Mason on 1/31/2013 (copy of death certificate attached as Exhibit 2), she owned 3 parcels of real property (3rd Street and 5th Street residences and a vacant lot in Clovis); the vacant lot contiguous to the house on 5th Street in Clovis, APN 492-203-16, is the property subject to this petition (copy of deed showing vacant lot in Ms. Mason's name attached as Exhibit 3); In early August 2012, Attorney Durost met with Ms. Mason in a skilled nursing facility for quite some time and believed her to be competent; however, she was very ill; Attorney Durost and Ms. Mason discussed the planning she needed and went over her real and tangible personal properties list; Attorney Durost prepared an amended and restated living trust for her, durable powers, a bill of sale for her tangible personal property, and deeds transferring the two residential (3rd Street and 5th Street residences) into the Trust; At that time, she apparently did not remember she also owned a vacant lot next to her 5th Street house (APN 492-203-16) and did not inform Attorney Durost of that property; 	<p>Minute Order states Ms. Durost will obtain signed waivers along with a verified declaration and file them forthwith.</p> <p>1. Waivers (Partial) of Notice of Petition for Order Confirming Trust Assets filed 12/1/2014 indicates the signatures of the following persons are pending, which need to be filed with the Court:</p> <ul style="list-style-type: none"> Thomas E. Mason, son; Matthew Mason, grandson; Amber D. Riggs, granddaughter.
Cont. from 111814		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	X	
<input type="checkbox"/> Aff.Mail	X	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input 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		
	~Please see additional page~	
		Reviewed by: LEG
		Reviewed on: 12/2/14
		Updates:
		Recommendation:
		File 10 - Mason

Petitioner states, continued:

- Unfortunately, Attorney Durost did not do a title search for all properties that may have been in her name, believing her to be astute enough during the initial interview to fully inform her of her estate assets;
- Attorney Durost prepared deeds to transfer the 3rd Street and 5th Street residences in the Trust, as well as whatever tangible personal property that was appropriately transferable (the 3rd Street residence is not relevant here);
- The deed transferring the 5th Street residence into the Trust was recorded on 8/13/2012 (*copy of Deed attached as Exhibit 4*);
- A deed then transferring the 5th Street residence into the name of Petitioner, Successor Trustee of the Trust, is further supporting documentation that the intent of Ms. Mason was that all of her properties be transferred to her trust so that her daughter could administer and distribute the properties as Ms. Mason wished;
- The non-transfer of the vacant lot was an inadvertent error [*emphasis in original*] on behalf of both Ms. Mason and Attorney Durost;
- The real property (both the 5th Street house and the contiguous vacant lot) is now under a contract of sale and the closing date is scheduled for 11/13/2014;
- Attorney Durost is asking on behalf of Petitioner that this matter be heard on an expedited basis.

Petitioner requests that the Court order under the authority contained in Probate Code § 850(a)(3) the following:

1. The **BETTY HORTON MASON LIVING TRUST as amended and restated on 8/6/2012** is valid; and
2. The real property consisting of a vacant lot contiguous to the house on 5th Street in Clovis, APN 492-203-16, is an asset subject to the management and control of Petitioner as sole Trustee of the Trust.

DOD: 7/28/14	KAREN AZEVEDO , spouse, is petitioner and requests appointment as Administrator without bond.	NEEDS/PROBLEMS/COMMENTS: Note: If the petition is granted, status hearings will be set as follows: <ul style="list-style-type: none"> Wednesday, April 22, 2015 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Wednesday, January 20, 2016 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.	
Cont. from	All heirs waive bond.		
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified	Full IAEA – o.k.		
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC	Decedent died intestate.		
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg	Residence: Laton Publication: Fresno Business Journal		
<input checked="" type="checkbox"/> Aff.Mail	W/		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.	Estimated value of the estate:		
<input type="checkbox"/> Pers.Serv.	Personal property - \$ 9,000.00		
<input type="checkbox"/> Conf. Screen	Income - \$ 10,000.00		
<input checked="" type="checkbox"/> Letters	Real property - \$350,000.00		
<input checked="" type="checkbox"/> Duties/Supp	Total - \$369,000.00		
<input type="checkbox"/> Objections	Probate Referee: Rick Smith		
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed by: KT
			Reviewed on: 12/3/14
		Updates:	
		Recommendation: SUBMITTED	
		File 11 – Azevedo	

Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for Failure to File the First Account or Petition for Final Distribution

DOD: 8/24/2008	VICTORIA PUMAREJO was appointed as Executor with full IAEA authority and without bond on 9/7/10.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 11/18/14. Minute order states Mr. Leichty is to obtain a reappraisal for sale. If not filed by 12/9/14 then Victoria Pumarejo must also be present on 12/10/14.</p> <p>1. Need first account, petition for final distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
	Letters issued on 9/7/10.	
Cont. from 031414, 111814	Inventory and appraisal filed 11/5/14 showing the estate valued at \$175,000.00	
Aff.Sub.Wit.	First account or petition for final distribution was due December 2011.	
Verified	Creditor's Claim of the Auditor Controller/Treasurer-Tax Collector was filed on 12/17/10 in the amount of \$17,863.50.	
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed on: 12/2/14
		Updates:
		Recommendation:
		File 12 – Maestas

Probate Status Hearing Re: Failure to File a First Account or Petition for Final Distribution

DOD: 10/23/11	<p>BETSY McMILLAN, daughter, was appointed as Executor with full IAEA and without bond on 01/04/12. Letters Testamentary were issued on 01/05/12.</p> <p>Inventory & Appraisal, partial no. 1, filed 03/14/12 - \$64,500.00</p> <p>Inventory & Appraisal, final, filed 11/20/12 - \$72,367.01</p> <p>Notice of Status Hearing filed 11/18/13 set this matter for status regarding failure to file a First Account or Petition for Final Distribution. Clerk's Certificate of Mailing states that a copy of the Notice of Status Hearing was mailed to attorney Joanne Sanoian and Betsy McMillan on 11/18/13.</p> <p>Unverified Status Report filed 01/30/14 requests a 60 day continuance for the Executor to prepare the First and Final Account.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 11/05/14 Minute Order from 11/05/14 states: If the petition is filed by 12/09/14, then no appearance is necessary on 12/10. Should it not be filed, the Court is considering sanctions and Mr. Bianco must be present or on Court Call.</p> <p>As of 12/02/14, nothing further has been filed.</p> <ol style="list-style-type: none"> 1. Need First Account or Petition for Final Distribution First Account or Petition for Final Distribution and/or current verified status report.
Cont. from 020714, 061014, 090214, 110514		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 12/02/14
		Updates:
		Recommendation:
		File 13 – Castle

DOD: 11/27/12	<p>ASPEN BELL was appointed Executor with Full IAEA authority and with bond set at \$215,950.00 on 4/9/13.</p> <p>Bond filed on 5/22/13.</p> <p>Letters issued on 5/22/13.</p> <p>I & A filed on 9/9/13 showing the estate valued at \$178,992.16.</p> <p>Minute Order dated 4/9/13 set this status hearing for the filing of the first account or petition for final distribution.</p> <p>Status Report filed on 11/19/14 states the estate is not yet in a condition to be closed because the estate's real property has not yet sold.</p> <p>Petitioner requests an extension of time for 6 months to close the administration of the estate.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need first account, petition for final distribution</p>
Cont. from 061314		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<p>Reviewed by: KT</p> <p>Reviewed on: 12/2/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 14 - Gintz</p>

Status Hearing Re: Filing of the Inventory and Appraisal

Age: 70	MARIA DE LOS ANGELES RODRIGUEZ , step-granddaughter, was appointed Conservator of the Person and Estate on 07/10/2014, with funds to be deposited in a Blocked Account.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Off Calendar.</u> <u>Inventory and Appraisal filed 12/01/2014.</u></p> <p>1. Need Inventory and Appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
	Letters issued 07/25/2014.	
Cont. from 111214	Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked account filed 08/19/2014 indicates \$7,451.68 was received.	
<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	Minute Order of 07/02/2014 set this Status Hearing for the filing of the Inventory and Appraisal.	
<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: LV
		Reviewed on: 12/03/2014
		Updates:
		Recommendation:
		File 15 – Arevalo

DOD: 2/18/14	<p>DIANNE COOLIDGE was appointed Administrator with Full IAEA authority and bond set at \$597,000.00 on 7/9/14.</p> <p>Minute order dated 8/20/14 reduced the bond to \$27,000.00 with Limited IAEA authority.</p> <p>Bond of \$27,000 was filed on 10/14/14.</p> <p>Letters issued on 10/14/14.</p> <p>Minute Order dated 7/9/14 set this status hearing for the filing of the inventory and appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Since the letter did not issue until 10/14/14 the inventory and appraisal is not due until February 11, 2015.</p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<p>Reviewed by: KT</p> <p>Reviewed on: 12/3/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 16 - Coolidge</p>

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 12/19/13	<p>BRET HELGREN was appointed Executor with Full IAEA authority and without bond on 7/11/14.</p> <p>Letters issued on 7/14/14.</p> <p>Minute Order dated 7/11/14 set this status hearing for the filing of the Inventory and Appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need inventory and appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>	
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: KT			
Reviewed on: 12/3/14			
Updates:			
Recommendation:			
File 17 – Chadwick			

Probate Status Hearing Re: Filing Inventory and Appraisal

DOD: 4/6/2007	<p>ELISA T. SIMPSON was appointed Administrator with Full IAEA authority and without bond on 8/27/14.</p> <p>Letters issued on 9/2/14.</p> <p>Minute Order dated 8/27/14 set this status hearing for the filing of the Inventory and Appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>2. Need inventory and appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>		
Cont. from				
Aff.Sub.Wit.				
Verified				
Inventory				
PTC				
Not.Cred.				
Notice of Hrg				
Aff.Mail				
Aff.Pub.				
Sp.Ntc.				
Pers.Serv.				
Conf. Screen				
Letters				
Duties/Supp				
Objections				
Video Receipt				
CI Report				
9202				
Order				
Aff. Posting				
Status Rpt				
UCCJEA				
Citation				
FTB Notice				
			Reviewed by: KT	
			Reviewed on: 12/3/14	
		Updates:		
		Recommendation:		
		File 18 – Escobar		

Age: 9 years	<p>DENISE RAMIREZ, maternal aunt, was appointed guardian on 5/18/2006.</p> <p>Father: UNKNOWN</p> <p>Mother: GRACIE PEREZ</p> <p>Maternal grandmother: Rosie Perez</p> <p>Guardian, Denise Ramirez, petitioned the court to move with the minor to Yuma, Arizona.</p> <p>On 6/11/14 the Court granted the request to move and set this status hearing for the filing of guardianship in Arizona.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof that a guardianship has been established in the state of Arizona.</p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	Reviewed by: KT	
	Reviewed on: 12/14/14	
	Updates:	
	Recommendation:	
	File 19 – Ramirez	

