

Petition for Attorney's Fees for Court Appointed Counsel for Conservatee [Prob. C. 1470(b)]

Age: 71	<p>JANET WRIGHT, Petitioner, was Court appointed to represent the Conservatee on 08/04/09.</p> <p>PUBLIC GUARDIAN, was appointed as Conservator of the Estate on 11/27/06 and as Conservator of the Person and Estate on 04/11/08.</p> <p>Petitioner requests fees in connection with the representation of the Conservatee from 10/16/11 – 08/31/13.</p> <p>Petitioner asks that she be paid from the conservatorship estate for 11.5 attorney hours @ \$300/hr. and .60 attorney hours @ \$200/hr. and 12.45 paralegal hours @ \$120/hr., plus costs in the amount of \$870.00 (for filing fees) for a total fee request of \$5,934.00.</p> <p>Services are itemized by date and includes review of documents, communications with client, and court appearances.</p>	NEEDS/PROBLEMS/COMMENTS:
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
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<input checked="" type="checkbox"/> Notice of Hrg		
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<input type="checkbox"/> Conf. Screen		
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<input type="checkbox"/> Duties/Supp		
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<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 12/10/13
		Updates:
		Recommendation:
		File 1 – Klein

Atty Roberts, Gregory J. (for Mark A. Hahn – Conservator of the Person/Petitioner)

(1) Petition for Approval and Reimbursement of Expenses Incurred and Personally Paid on Behalf of Conservatee and for (2) Approval and Payment of Unpaid Attorney's Fees and Costs

DOD: 09/05/13		MARK A. HAHN , son/Conservator of the Person, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. According to the First Account of the Public Guardian filed 12/05/11, Petitioner was paid \$82,408.55 for living expenses for the past and future care of the conservatee. Further, the First Account and Second and Final Account (which is set for hearing on 01/07/14) show monthly payments to Petitioner in varying amounts ranging from \$877.00 to \$4,582.38 per month for living expenses of the conservatee. The Court may need clarification as to why the utility and PG&E bills were not covered by the living expenses payments already paid to Petitioner. It is noted that according to the First & Second Accounts, Petitioner has been paid \$177,264.37 for the conservatee's living expenses. It is also noted that per the Ex Parte Order Approving Expenses Incurred on behalf of Conservatee and for Reimbursement 09/2008 – 12/2008, Petitioner was to be paid \$26,641.79 for the conservatee's expenses.</p> <p>Note: It is unclear whether these reimbursements paid to the Petitioner were to include the legal fees.</p>
		Petitioner was appointed Conservator of the Person on 07/08/08.	
Cont. from		PUBLIC GUARDIAN , was appointed as Conservator of the Estate on 10/23/09.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
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<input type="checkbox"/>	Pers.Serv.		
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<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
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<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Petition for Attorney's Fees for Court Appointed Counsel for Conservatee [Prob. C. 1470(b)]

Age: 91 years		<p>JANET WRIGHT, petitioner was Court appointed to represent the Conservatee on 4/9/10.</p> <p>CRAIG McGLASHAN was appointed Conservator of the Person and Estate on 5/25/10.</p> <p>Petitioner requests fees in connection with the representation of the Conservatee in connection with the first account and for preparation of the last petition for attorney fees.</p> <p>Petitioner asks that she be paid from the conservatorship estate for 4.65 attorney hours @ \$300.00 per hour and 5.15 paralegal hours @ \$120.00 per hour for a total of \$2,013.00 and for costs of \$435.00 for the filing of this petition.</p> <p>Services are itemized by date and include review of documents, conferences with counsel and court appearance.</p>	NEEDS/PROBLEMS/COMMENTS:				
Cont. from							
<input type="checkbox"/>	Aff.Sub.Wit.						
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		<table border="1"> <tr> <td>Reviewed by: KT</td> </tr> <tr> <td>Reviewed on: 12/11/13</td> </tr> <tr> <td>Updates:</td> </tr> <tr> <td>Recommendation:</td> </tr> <tr> <td>File 3 – McGlashan</td> </tr> </table>	Reviewed by: KT	Reviewed on: 12/11/13	Updates:	Recommendation:	File 3 – McGlashan
Reviewed by: KT							
Reviewed on: 12/11/13							
Updates:							
Recommendation:							
File 3 – McGlashan							

		MARIA ALVAREZ-GARCIA , Trustee, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 11-14-13. Nothing further has been filed. The following issues remain:</u></p> <ol style="list-style-type: none"> 1. There is no provision for waiver of accountings for Special Needs Trusts. The Court may require further accountings pursuant to Probate Code §3604, Cal. Rules of Court 7.903(b) and (c)(6). 2. Need order.
		Account period: 10-18-11 through 8-16-13	
Cont. from 111413		Accounting: \$167,809.04	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH: \$142,460.82	
<input checked="" type="checkbox"/>	Verified	Ending POH: \$184,205.54 (\$152,381.96 cash plus vehicle)	
<input type="checkbox"/>	Inventory	Conservator: Not requested	
<input type="checkbox"/>	PTC	Attorney: \$3,735.00 plus costs of \$435.00 (Total \$4,170.00)	
<input type="checkbox"/>	Not.Cred.	Petitioner requests that further reports and accounts be waived since the trust funds are invested in a blocked account, the monthly annuity payments of \$1,151.00 are made directly to this account, and funds may not be withdrawn without prior court order. The trustee is not receiving any trustee fees.	
<input checked="" type="checkbox"/>	Notice of Hrg	Petitioner prays for an order:	
<input checked="" type="checkbox"/>	Aff.Mail	1. Settling, allowing, and approving this Second Report and Account;	
<input type="checkbox"/>	Aff.Pub.	2. Ratifying and approving all acts and transactions of the Trustee as set forth in this Second Report and Account;	
<input type="checkbox"/>	Sp.Ntc.	3. Authorizing payment of the attorney fees and costs from the blocked account;	
<input type="checkbox"/>	Pers.Serv.	4. Waiving all future accountings required under Probate Code §§ 1060 and 2620 provided the funds are held in a blocked account and annuity payments are directly deposited to blocked account;	
<input type="checkbox"/>	Conf. Screen	5. Such further order be made as the Court considers proper.	
<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		
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<input type="checkbox"/>	Citation		
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		Reviewed by: skc	
		Reviewed on: 12-11-13	
		Updates:	
		Recommendation: File 4 – Carbajal	

**Amended Petition for Final Distribution and for on Waiver of Accounting
 Allowance of Compensation for Ordinary Services [Prob. C. 10954]**

DOD: 11/23/10		<p>MARIAN MOSLEY, Administrator, is Petitioner.</p> <p>Accounting is waived.</p> <p>I & A - \$80,000.00 POH - \$42,488.13 (all cash)</p> <p>Administrator - waived</p> <p>Attorney - \$3,200.00 (statutory)</p> <p>Costs - \$1,555.50 (filing fees, certified copies, publication, probate referee)</p> <p>Distribution, pursuant to intestate succession, is to:</p> <p>Marian Mosley - Remaining funds on hand after payment of statutory fees and costs to attorney</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. The Order does not specify the dollar amount to be distributed Marian Mosley. Pursuant to Local Rule 7.6.1 - All orders or decrees in probate matters must be complete in themselves. Orders shall set forth all matters ruled on by the court, the relief granted, and the names of persons, descriptions of property and/or amounts of money affected with the same particularity required of judgments in general civil matters. <u>Monetary distributions must be stated in dollars, and not as a percentage of the estate.</u> Need revised Order.</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/o		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters 06/01/11		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
		<p>Reviewed by: JF</p> <p>Reviewed on: 12/11/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 5 – Hanson</p>	

Atty **Teixeira, J. Stanley, sole practitioner (for Petitioner)**

(1) Petition for Final Distribution on Waiver of Accounting and (2) for Allowance of Statutory Commissions [Prob. C. 10400-10406, 10954, 11600-11642]

DOD: 3/25/2012		DAVID BRANDL , son and Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: ~Please see additional page~
		Accounting is waived.	
		I & A — \$334,795.95	
		POH — \$325,426.60 <i>(all cash)</i>	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.	Executor — waives	
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory	Attorney — \$10,466.99 <i>(statutory)</i>	
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.	Attorney X/O — \$1,125.00 <i>(per Exhibit F, Exhibit F-1 itemization, for 4.50 hours @ \$250/hr; for unlawful detainer action against beneficiary Robert J. Brandl)</i>	
<input checked="" type="checkbox"/>	Aff.Mail	<input type="checkbox"/> W/ <input type="checkbox"/> O	
	Aff.Pub.	Costs — \$622.20 <i>(filing fees; service in unlawful detainer; itemized in Exhibit F-1)</i>	
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen	Closing — \$5,000.00 <i>(proposed expenses not stated)</i>	
	Letters	053012	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
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		<p>Petitioner states that the Petitioner and the estate were subjected to undue consumption of time and had to incur otherwise unnecessary expenses because of an unlawful detainer action filed against ROBERT JOSEPH BRANDL, who is a beneficiary under Decedent's Will, and who was residing in real property belonging to the estate; attorney fees and costs were incurred because of delays relating to the sale of the real property solely because Robert was not willing to cooperate in the showing and sale.</p> <p>Petitioner requests that the Court, under provisions of Code of Civil Procedure § 128.5 that Robert's share of the estate be assessed and charged for the attorney fees and costs incurred in the unlawful detainer action.</p> <p align="center">~Please see additional page~</p>	
			Reviewed by: LEG Reviewed on: 12/10/13 Updates: Recommendation: File 6 – Brandl

Petitioner states distribution pursuant to Decedent's Will is to:

- **DAVID G. BRANDL** – 1/4 of the estate consisting of **\$77,489.90 cash** (after deduction for statutory commissions and closing reserve);
- **BARBARA R. BRANDL** – 1/4 of the estate consisting of **\$77,489.90 cash** (after deduction for statutory commissions and closing reserve);
- **ROBERT J. BRANDL** – 1/4 of the estate consisting of **\$75,742.70 cash** (after deduction for statutory commissions, extraordinary fees, and closing reserve);
- **NATASHA M. GOEN** – 1/4 of the estate consisting of **\$77,489.90 cash** (after deduction for statutory commissions and closing reserve).

NEEDS/PROBLEMS/COMMENTS:

Note: Petitioner's *Exhibit C, Beneficiaries Under Decedent's Will*, states the "Decedent's Will disposes of her estate as follows" and includes text of articles SIXTH and SEVENTH that does not match the Decedent's Will dated 11/8/2007 that was admitted to probate by this Court on 5/30/2012. The devises stated in Paragraph 1 of *Exhibit C* do not match the proposed distribution stated in Paragraph 2 of *Exhibit C*, as **JUSTIN THOMAS BRANDL** would be entitled to a share based upon Paragraph 1 of *Exhibit C*; however, Decedent's Will admitted to probate specifically states in Article SIXTH that Decedent makes no provision for **JUSTIN [THOMAS] BRANDL**. Despite the inaccuracy contained in Paragraph 1 of *Exhibit C*, Paragraph 2 of *Exhibit C* proposes to distribute the estate consistently with Decedent's Will dated 11/8/2007 that was admitted to probate by this Court on 5/30/2012.

1. CA Code of Civil Procedure § 128.5(c) provides: "Expenses pursuant to this section shall not be imposed except on notice contained in a party's moving or responding papers; or the court's own motion, after notice and opportunity to be heard. An order imposing expenses shall be in writing and shall recite in detail the conduct or circumstances justifying the order." Proposed order submitted by Petitioner does not recite the conduct or circumstances justifying the order for payment of expenses by beneficiary Robert J. Brandl. If Court determines the requested assessment and charge to Robert J. Brandl of attorney fees and costs incurred in the unlawful detainer action is warranted, need revised proposed order complying with CA Code of Civil Procedure § 128.5(c).

(1) First Account and Report of Guardian and Petition for Its Approval; (2) for Allowance of Fees and Costs; and (3) for Waiver of Future Accountings [Prob. C. 2620 & 2640]

Age: 10 years	JENNIFER R. KEMP , Guardian, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 5/31/12 – 5/31/13	
	Accounting - \$222,582.26	
	Beginning POH - \$221,749.49	
	Ending POH - \$222,582.26	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Guardian - not addressed	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC	Attorney - \$4,060.00 (per itemization and declaration, 7 hrs of attorney time at \$280/hr and 9 hrs of paralegal time at \$140/hr. Fees also include 3 hours in anticipated time for attending the hearing and follow-up)	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	W/	
<input type="checkbox"/> Aff.Pub.	Costs - \$942.00 (filing fees, certified copies)	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Petitioner requests the court dispense with future accountings. All funds are in a blocked account. Petitioner states dispensing with future accountings will result in a savings to the estate of the costs and fees associated with presenting accountings.	
<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		
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<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: 12/11/13
		Updates:
		Recommendation:
		File 7 – Kemp

DOD: 8/25/12	DELIA GONZALEZ was appointed as Administrator of the estate with limited IAEA and with bond set at \$100,000.00 on 10/10/12.	NEEDS/PROBLEMS/COMMENTS:
	Bond was filed on 10/15/12.	
	Letters issued on 10/15/12.	
Cont. from 120613	Inventories and appraisals were filed totaling \$2,416,144.97.	
<input type="checkbox"/> Aff.Sub.Wit.	Additional bond of \$100,000.00 was filed on 2/1/13 (total bond amount is \$200,000.00).	
<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	Order allowing full IAEA authority signed on 2/28/2013.	
<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	<p>Status Report filed on 11/21/13 states all assets of the estate have been inventoried. In addition to the task of paying estate obligations, assisting in the sale of estate property, the Administrator has worked diligently with the estate's accountant to resolve outstanding issues with the Internal Revenue Service (IRS) and the Employment Development Department (EDD).</p> <p>There are two outstanding litigation issues: (1) the parties to Francisco De La Mora vs. Irlybird, case no. 12CECG02162 have reached an agreement. (2) The Jesus Rivera vs. Delia Gonzalez case no. 12CEDB01695 is still in negotiations.</p> <p>The Decedent had an interest in 4 businesses (1) JDM Brokerage Inc. must remain open until the Jesus Rivera claim is settled. (2) JDM Transport Inc. has an outstanding EDD issue to resolve. (3) L&M, Inc. has an outstanding IRS issue that must be resolved before the corporation can be sold or liquidated. (4) The sale of D.F. & Associates was completed earlier this month and the administrator received the Decedent's share of the proceeds on 11/21/13.</p>	
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
Please see additional page		<p>Reviewed by: KT</p> <p>Reviewed on: 12/10/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 8A – De La Mora</p>

Status Report cont. Decedent had an interest in 11 parcels of real property. All but one has been sold. It is anticipated that the first account will ready for the court's review shortly after the first of the new year.

Petition for Preliminary Distribution and for Allowance of Compensation to Administrator and Attorney for Extraordinary Fees [Prob. C. 11623, 10832, CRC 7.700, 7.702, 7.703]

DOD: 8/25/12	DELIA GONZALEZ , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	Petitioner requests authorization to make preliminary distributions not to exceed 50% of the estate's value and for the payment of extraordinary fees to the petitioner and her attorney.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory	Inventories and appraisals filed in the estate total \$1,912,817.40. The total value of all creditor's claims filed and served, liens, encumbrances recorded or known, and fees paid to date for property taxes, accounting, repairs, utilities etc. is approximately \$565,313.00. Therefore, the excess amount is approximately \$1,347,504.00, 50% of which is \$673,752.00.	
<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.	The beneficiaries of the estate are the decedent's three minor children. Petitioner requests the authority to distribute the sum of \$100,00.00 to each minor's guardianship estate (see pages 24-26)	
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections	Petitioner further requests the court allow payment of extraordinary fees to the Administrator and her attorney in the sum of \$2,000.00 each for the sale of two parcels of real property.	
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order	In addition the Petitioner request the court allow payments of extraordinary fees to the petitioner's attorney in the sum of \$3,234.00 (per itemization and declaration 10.78 hrs @ \$300/hr) for litigation activities associated with the estate.	
<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: 12/10/13
		Updates:
		Recommendation:
		File 8B – De La Mora

DOD: 8/25/12	<p>DELIA GONZALEZ was appointed as Administrator of the estate with limited IAEA and with bond set at \$100,000.00 on 10/10/12.</p> <p>Bond was filed on 10/15/12.</p> <p>Letters issued on 10/15/12.</p> <p>Inventories and appraisals were filed totaling \$2,214,083.33.</p> <p>Additional bond of \$100,000.00 was filed on 2/1/13 (total bond amount is \$200,000.00).</p> <p>Order allowing full IAEA authority signed on 2/28/2013.</p> <p>Status Report filed on 11/21/13 states all assets of the estate have been inventoried. In addition to the task of paying estate obligations, assisting in the sale of estate property, the Administrator has worked diligently with the estate's accountant to resolve outstanding issues with the Internal Revenue Service (IRS) and the Employment Development Department (EDD).</p> <p>There are two outstanding litigation issues: (1) the parties to Francisco De La Mora vs. Irlybird, case no. 12CECG02162 have reached an agreement. (2) The Jesus Rivera vs. Delia Gonzalez case no. 12CEDB01695 is still in negotiations.</p> <p>The Decedent had an interest in 4 businesses (1) JDM Brokerage Inc. must remain open until the Jesus Rivera claim is settled. (2) JDM Transport Inc. has an outstanding EDD issue to resolve. (3) L&M, Inc. has an outstanding IRS issue that must be resolved before the corporation can be sold or liquidated. (4) The sale of D.F. & Associates was completed earlier this month and the administrator received the Decedent's share of the proceeds on 11/21/13.</p> <p style="text-align: center;">Please see additional page</p>	NEEDS/PROBLEMS/COMMENTS:
Cont. from 120613		
Aff.Sub.Wit.		
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Notice of Hrg		
Aff.Mail		
Aff.Pub.		
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Conf. Screen		
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Reviewed by: KT		
Reviewed on: 12/10/13		
Updates:		
Recommendation:		
File 9A – De La Mora		

Status Report cont. Decedent had an interest in 11 parcels of real property. All but one has been sold. It is anticipated that the first account will ready for the court's review shortly after the first of the new year.

Petition for Allowance of Extraordinary Fees to Representative and Attorney [Prob. C. 10832; CRC 7.700, 7.702; 7.703]

DOD: 8/25/12		<p>DELIA GONZALEZ, Administrator, is petitioner.</p> <p>Petitioner requests authority to pay herself and her attorney extraordinary fees.</p> <p>Petitioner requests the court allow payment of extraordinary fees to the Administrator and her attorney in the sum of \$2,000.00 each for the sale of two parcels of real property.</p> <p>In addition the Petitioner request the court allow payments of extraordinary fees to the petitioner's attorney in the sum of \$5,736.00 (per itemization and declaration 17.92 hrs @ \$300/hr) for services in connection the decedents businesses and with litigation activities associated with the estate.</p>	NEEDS/PROBLEMS/COMMENTS:	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
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<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: 12/10/13
		Updates:		
		Recommendation:		
		File 9B – De La Mora		

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

	YVETTE BEST is petitioner and requests appointment as Administrator without bond.	NEEDS/PROBLEMS/COMMENTS: 1. Katrina Best Kendall was appointed as Administrator of the estate on 11/26/12. Therefore, there is no vacancy.
	Full IAEA - not published for	
	Decedent died intestate.	
Cont. from 092613, 103013	Residence: Sanger Publication: Need	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Estimated value of the estate:	
Aff.Mail	Personal property - \$248,000.00	
Aff.Pub.	Real property - \$240,000.00	
Sp.Ntc.	Total - \$488,000.00	
Pers.Serv.	Probate Referee: Rick Smith	
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: 12/10/13
		Updates:
		Recommendation:
		File 10 - Best

(1) First and Final Account and Petition for Settlement of First and Final Account and (2) Final Distribution and (3) for Allowance of Compensation for Ordinary Services for Petitioner and Petitioner's Attorney [Prob. C. 10900, 10951, 11640, 10800, 10810]

DOD: 5-7-13		<p>CURTIS J. SIGLE, Administrator with Full IAEA without bond, is Petitioner.</p> <p>Account period: 3-16-13 through 10-30-13 Accounting: \$215,000.00 Beginning POH: \$215,000.00 Ending POH: \$215,00.00 (real property)</p> <p>Administrator (Statutory): Waived</p> <p>Attorney (Statutory): Waived</p> <p>Distribution pursuant to intestate succession:</p> <p>Curtis J. Sigle: Real property valued at \$215,000.00</p>	NEEDS/PROBLEMS/COMMENTS:
	Aff.Sub.Wit.		
✓	Verified		
✓	Inventory		
✓	PTC		
✓	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail w		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters 5-7-13		
	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: 12-11-13</p> <p>Updates:</p> <p>Recommendation: SUBMITTED</p> <p>File 11 – Sigle</p>	

(1) Petition to Close and Distribute Estate on Waiver of Account and (2) to Approve Payment of Administrator's Statutory Fees and Attorney's Fees [Prob. C. 11640, 10954, 10800 & 10810]

DOD: 4/3/13	ZACHARY T. KELLER , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:	
	Accounting is waived.		
Cont. from	I & A - \$403,458.81		
<input type="checkbox"/> Aff.Sub.Wit.	POH - \$396,198.87		
<input checked="" type="checkbox"/> Verified	Administrator (statutory) - \$11,069.18		
<input checked="" type="checkbox"/> Inventory	Attorney (less than statutory) - \$10,000.00		
<input checked="" type="checkbox"/> PTC	Closing - \$10,000.00		
<input checked="" type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	W/		
Aff.Pub.	Distribution pursuant to intestate succession and assignments of interest, is to:		
Sp.Ntc.	Zachary T. Keller - \$20,564.84, 25% interest in real property located in Clovis, CA and 12.5% interest in real property located in Long Beach, CA.		
Pers.Serv.			
Conf. Screen	Westley Keller - \$1,764.85, 25% interest in real property located in Clovis, CA and 12.5% interest in real property located in Long Beach, CA.		
<input checked="" type="checkbox"/> Letters	2/28/13		
Duties/Supp			
Objections	Inheritance Funding Corp. - \$8,800.00		
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: KT
			Reviewed on: 12/12/13
		Updates:	
		Recommendation: SUBMITTED	
		File 12 – Keller	

Petition for Order Approving Establishment of Special Needs Trust

		<p>HELEN WOODWARD, guardian ad litem, is petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
		<p>Petitioner states Daniel Kandarian is to receive \$50,000.00 as a result of a settlement of a dispute over the validity of the Wanda Kandarian Trust.</p>	<p>OFF CALENDAR. Amended Petition filed and set for hearing on 1/6/2014.</p>	
<p>Cont. from 101613, 111313</p>				
	Aff.Sub.Wit.	<p>Daniel Kandarian is disabled and received needs-based public benefits. Mr. Kandarian was struck by a car while riding while riding a motorcycle without a helmet in 1984, which seriously impaired both his physical and mental abilities. Mr. Kandarian requires a trust to provide for his care and to purchase a trailer for his personal dwelling.</p> <p>After payment of costs and attorney fees Mr. Kandarian will received approximately \$47,800.00. Petitioner seeks to establish a Special Needs Trust and an order that Petitioner is authorized to sign the proposed Special Needs Trust as grantor.</p> <p>Petitioner requests the Court establish the Daniel Kandarian Special Needs Trust (copy attached to petition).</p> <p>That Tom Avedisian and Louise Avedisian, first cousins of Daniel Kandarian shall service as co-trustee's without bond. That all statutory liens in favor of the Department of Health Services, Department of Mental Health, the State Department of Developmental Services, and any county, or city and county in California must first be satisfied pursuant to Probate Code §3604(d).</p> <p>That the Trustee provide the court with a biennial accounting and report beginning one year from the date the Court approves the establishment of the trust and every two years thereafter unless the ordered by the court to be more frequent.</p>		
✓	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			
			<p>Reviewed by: KT</p> <p>Reviewed on: 12/10/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13 – Kandarian</p>	

Page 2

Petitioner states Ms. Gingold has failed to (Continued):

- Inventory and appraise any of the assets;
- Maintain the real property located at 5887 W. San Gabriel in Fresno;
- Provide any accounting, including all bank statements, receipts, and disbursement pursuant to Probate Code §17200(b)(7)(B) and §§ 16062 and 16063;
- Petitioner alleges that Ms. Gingold has lived in the property without payment of rent, has used trust assets to pay for utilities, cable, and other items for her sole personal use;
- Ms. Gingold has failed to assemble personal property, which is depreciating in value, in order to auction or sell, or provide notice to beneficiaries as to whether said personal property should be distributed;
- Ms. Gingold has failed to provide any information re life insurance policies, final expense bills, or other related financial information;
- Ms. Gingold has failed to file the appropriate income tax returns, estate tax returns, and other tax reporting requirements for the trust on a timely basis; and
- Ms. Gingold has exhibit hostility and impairing the administration of the trust, which is reflected as grounds for removal pursuant to Probate Code §15642(b)(3).

Additional information:

- The Trustor of the **EMELIA C. CALNEK TRUST** was also known as **EMELIA CHARLOTTE JENNRICH** (see death certificate).
- The real property asset of the estate located at 5887 W. San Gabriel in Fresno refers to "**EMILIA C. CALNEK JENNRICH, Trustee of the EMILIA C. CALNEK TRUST**" (see Grant Deed).
- The **Sixth (6th) Amendment**, attached as Exhibit C, dated 6-28-07 nominates Petitioner and Ms. Gingold as Co-Trustees. A letter from Attorney Steve H. Murphy dated 6-8-10 confirms.
- There are eight **(8) beneficiaries**. Petitioner lists names, but not relationships.
- Declaration of No Service filed 11-25-13 indicates that a process server made numerous attempts to serve Ms. Gingold at the San Gabriel address; however, no one answers the door. Declaration filed 12-10-13 indicates additional attempts to serve Ms. Gingold at two other addresses in Mariposa, CA.

Petitioner requests that:

1. **The Court remove the Successor Co-Trustee PAMELYN SHARLEY GINGOLD from office and appoint ANNE LAWRENCE as the sole Successor Trustee of the EMELIA C. CALNEK TRUST dated December 19, 1995;**
2. **The Court order PAMELYN SHARLEY GINGOLD to provide a full accounting from the date of death of the decedent of 1-28-10 to the date of her removal;**
3. **The Court order Attorney's fees of the Petitioner to be paid in an amount to be determined;**
4. **The Court make all further and proper orders.**

SEE ADDITIONAL PAGES

Page 3

Objection filed 12-9-13 by Co-Trustee Pamelyn S. Ginsold admits certain facts as stated above regarding the name of the Trustor, the real property as an asset of the trust, and the nomination of Petitioner and Objector as co-trustees; however, Objector denies the allegations of Petitioner in Paragraph 6 and all subparagraphs, except as follows:

Ms. Gingold denies residing at the San Gabriel property, and denies that Jeremiah Gingold and Serena Katherine Gingold have ever resided there. Petitioner knew they do not reside there, yet served documents at that address to avoid providing actual notice of these proceedings to Ms. Gingold, Jeremiah, and Serena Gingold. Additionally, Ms. Gingold is informed and believes and thereon alleges that the decedent's surviving spouse, **EDWARD W. JENNRICH**, is entitled to notice of these proceedings as he may have a beneficial interest in the San Gabriel property under the terms of the Sixth Amendment.

Ms. Gingold states: She and Petitioner are the daughters of the decedent. Decedent was survived by her spouse, Edward W. Jennrich, whom Ms. Gingold is informed, believes, and thereon alleges now resides in Pasadena California, by her two daughters, Ms. Gingold and Petitioner, her son Peter J. Deyell, and five grandchildren. All of these individuals are named beneficiaries under the Sixth Amendment.

Decedent was also survived by a son, David A. R. Deyell, but he is not a beneficiary under the Sixth Amendment. He also appears to be disinherited under the terms of Decedent's will dated 3-16-00 (attached).

Following Decedent's death in Jan 2010, Ms. Gingold and Petitioner gathered Decedent's estate planning documents and Petitioner took them to her home in Colorado. Petitioner therefore had the 1995 Trust instrument and all amendments thereto in her possession. Ms. Gingold thus denies Petitioner's allegation that she withheld copies from Petitioner or any other beneficiary.

Ms. Gingold states neither she nor Petitioner retained legal counsel to advise them regarding administration of the trust. Ms. Gingold understood that as a co-trustee, she was to maintain the San Gabriel residence and pay expenses related to the maintenance and assets of the trust, and has done so. The decedent's final expenses were paid as well as ongoing expenses related to the real property. Ms. Gingold has supervised the upkeep of the property, maintained a trust checking account with Petitioner as co-trustees, which Petitioner has access to, and has made distributions to beneficiaries according to the Sixth Amendment. She prepared an inventory of the contents of the house and obtained appraisal of the contents and discussed with Petitioner. Petitioner at all times consented to Ms. Gingold's handling the responsibilities and never voiced any objection or disagreement. Rather, Petitioner expressed her preference that Ms. Gingold undertake these responsibilities, as she resides in Colorado, and Ms. Gingold, a resident of Mariposa, was better situated to handle administration of Fresno assets.

SEE ADDITIONAL PAGES

Page 4

Objector states (Continued):

To the extent that any administrative tasks went undone, Ms. Gingold was unaware of such tasks. She was not represented by counsel. Petitioner, on the other hand, was employed as a paralegal for a law firm and is now a clerk of the Dolores County Court in Colorado. Petitioner represented that she would determine and inform Ms. Gingold of any and all tasks of a legal nature required for administration. Aside from the responsibilities that Ms. Gingold has undertaken (bill pay, etc.), Petitioner never identified any tasks for her to complete.

Ms. Gingold submits that Petitioner had an equal responsibility to complete the administrative tasks, and to the extent there is any fault on the part of Ms. Gingold, which she denies, Petitioner is equally at fault. Petitioner has not set forth sufficient grounds to justify Ms. Gingold's removal, an order compelling her to account, or an award of attorney's fees.

Objector requests that the Court deny each and every claim for relief in the Petition; award Objector her costs incurred in this matter; and order any and all further relief the Court deems just and proper.

DOD: July 27, 1997	<p>FRANK VOLPA, Executor, filed a petition for instructions on 8/30/2013. Mr. Volpa stated in his petition that although the order for final distribution had been entered in 2007 he had not yet distributed all the assets to the beneficiaries because of unforeseen tax issues. Mr. Volpa requested that the court allow him to pay himself and his attorney and possibly a CPA for work that needed to be done to allow the remaining assets to be distributed.</p> <p>On 10/3/13 the Court denied the Petition. Minute order from the hearing states the Court is not in a position to allow fees to be paid for what should have been done. The Court set this status hearing and ordered Frank Volpa to be personally present.</p> <p>Status Report filed on 12/9/13 states as the court is aware Mr. Volpa has not distributed all the assets of the estate. Mr. Volpa is still in possession of assets that are distributable to the University of Montana and to the Sigma Chi Foundation.</p> <p>Since the last hearing Mr. Volpa's attorneys have contacted those organizations and are in the process of or obtaining receipts for assets that were distributed. The University of Montana acknowledged receipts of assets totaling \$352,470.36. The Sigma Chi Foundation has not yet provided detail of what they received.</p> <p>Mr. Volpa's attorneys have also been in contact with Vanguard. Vanguard holds an IRA with a current value of about \$179,000.00. Mr. Volpa is the named beneficiary but disclaimed any interest by document filed with the court on 5/26/2006. They are in the process of converting the account into an estate account in order to be able to distribute to the proper parties. It does not appear that the conversion will be taxable.</p> <p>Mr. Volpa's attorneys are preparing an account of activities since the 2007 order for distribution. Mr. Volpa requests that the status on this matter be continued 4-6 weeks in order for his attorneys to complete the account and present a plan for distribution to the court.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cont. from 101713		
Aff.Sub.Wit.		
<input checked="" type="checkbox"/> 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: 12/10/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 16 – Hanson</p>	

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u> Receipt and Acknowledgement of Order for the Deposit of Funds into Blocked Account was filed 11/25/13</p> <p>Note: Status Report of Guardian filed 10/31/13 indicates that the funds deposited into a blocked account represent a portion of the settlement proceeds payable to the minor. A Status hearing regarding receipt of further settlement funds will be set as follows:</p> <ul style="list-style-type: none"> • Friday, 02/07/14 at 9:00 am in Dept. 303 for status regarding additional settlement proceeds 	
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: JF
			Reviewed on: 12/11/13
			Updates:
		Recommendation:	
		File 18 – Espinosa	

Atty **Faulkner, Willie Faye (Pro Per – Paternal Grandmother – Petitioner)**

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

Antiwan, age 13	<p align="center"><u>TEMPORARY ORDERS GRANTED AS TO JANAE FAULKNER AND DESHUN FAULKNER ONLY.</u></p> <p align="center"><u>TEMPORARY EXPIRES 12-12-13</u></p> <p>WILLIE FAYE FAULKNER, Paternal Grandmother, is Petitioner.</p> <p>Father: ANTIWAN FAULKNER, SR. - Personally served 12/02/2013</p> <p>Mother: MARION MILLS - Personally served 12/02/2013</p> <p>Paternal Grandfather: Deceased Maternal Grandfather: Unknown Maternal Grandmother: Roshell Mills, Personally served on 11/29/2013</p> <p>Petitioner states guardianship is needed so the mother won't come back and take the kids. She has nowhere to go. She comes and gets the children and leaves them with anyone for days at a time. Antiwan needs to be in school. Petitioner states that the children are homeless and their mother loses her apartment every three months. She states the mother only keeps the children for welfare.</p> <p>Court Investigator Jennifer Daniel's report filed 12/06/2013.</p>		<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> The minor Antiwan (13) is a ward of the Juvenile Delinquency Court until 8-14-14 in 13CEJ600281-1. Therefore, Probate Guardianship is not appropriate for this minor. Petitioner may wish to inquire about guardianship through the Juvenile Court. 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"> Antiwan Faulkner, Sr. (Father) <p>Note: Personally served on 12/02/2013 only 10 days prior to the hearing.</p> <ul style="list-style-type: none"> Marion Mills (Mother) <p>Note: Personally served on 12/02/2013 only 10 days prior to the hearing.</p> Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice of declaration of due diligence for: <ul style="list-style-type: none"> Maternal Grandfather (Unknown) 	
Janae, age 8				
Deshun, age 6				
Cont. from				
Aff.Sub.Wit.				
✓ Verified				
Inventory				
PTC				
Not.Cred.				
✓ Notice of Hrg				
✓ Aff.Mail	w/			
Aff.Pub.				
Sp.Ntc.				
✓ Pers.Serv.	w/			
✓ Conf. Screen				
✓ Letters				
✓ Duties/Supp				
Objections				
Video Receipt				
✓ CI Report				
9202				
✓ Order				
Aff. Posting				
Status Rpt				
✓ UCCJEA				
Citation				
FTB Notice				
		<p>Reviewed by: LV</p> <p>Reviewed on: 12/10/2013</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 19 – Faulkner</p>		

Letter from Laura Laird, MS, Registered MFT Intern at Comprehensive Youth Services dated 11/13/13 concludes that after observing Ms. Vasquez and the children during 14 therapeutic visits Ms. Laird has observed both children as being comfortable with Ms. Vasquez as evidenced by them communicating openly with Ms. Vasquez, inviting her into their play, asking for help when needed and playing closely with her, even leaning against her occasionally. Elijah and Elaina Vasquez have not displayed any signs of distress since the visits were shortened.

Order After Hearing dated 3/11/2013 ordered:

1. Neither parent shall have telephone communication with the minor children.
2. The parents shall have separate therapeutic visitation through Comprehensive Youth Services or a comparable agency that provides therapeutic visitation with the children. All therapeutic visitation shall be arranged by the agency and/or therapeutic counselor with dates and times to be arranged by the agency and/or therapeutic counselor.
3. The children's therapists shall each provide the Court and the Court Investigator with a letter regarding the children's progress in therapy, any issues pertinent and relevant regarding the children's contact with their parents, and any other issues the therapist deems pertinent. The letters shall be provided to the court prior to July 11, 2013.
4. The mother and/or father shall provide the Court Investigator proof of any mental health treatment they are engaged in or have engaged in.
5. The parties shall not discuss the substance of this matter around the children.

Atty **Boyajian, Thomas M., sole practitioner (for Petitioner Carl John Peterson, former spouse)**
 Atty **Shahbazian, Steven L., sole practitioner (for Objector Kimbra Pannett, daughter)**

Ex Parte Petition for Letters of Special Administration with Limited Authority

Age:	CARL JOHN PETERSON , former spouse and first named Executor without bond, is Petitioner and requests appointment as Special Administrator with Limited IAEA authority without bond, because the Special Administrator is the named Executor and the Will waives bond.	NEEDS/PROBLEMS/COMMENTS:
DOD:		Note: Second Amended Petition for Probate of Lost Will filed 10/21/2013 by Petitioner Carl Peterson has been continued to 1/7/2014 , per Minute Order dated 10/29/2013, which states counsel requests that the matter be set for court trial with a 2-day estimate.
Cont. from		Note: Order on Ex Parte Petition for Letters of Special Administration with Limited Authority filed 11/26/2013 set this hearing on 12/12/2013, finding that bond may be required and that notice of hearing shall be provided to all interested parties.
<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 checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order	<p>Lost Will dated: 6/19/2012 Residence: Clovis Publication: Business Journal</p> <p>Estimated value of the Estate: Personal property - \$434,000.00 Real property - \$325,000.00 Total: - \$759,000.00</p> <p>Probate Referee: Steven Diebert</p> <p>Petitioner states:</p> <ul style="list-style-type: none"> A contest has been filed to the probate of the document filed in this case and offered for probate as the Decedent's last Will; There will be great delay in granting letters testamentary and of the estate administration pending the determination of the Will contest, and it is necessary that someone take charge of and care for the estate property until the contest has been determined; <p>~Please see additional page~</p>	<ol style="list-style-type: none"> Need Notice of Hearing and proof of service by mail for: <ul style="list-style-type: none"> Kimbra Pannett, daughter; Tambra Peterson, daughter; Matthew Peterson, grandchild; Cynthia Ann Wallert, sister; Larry G. Fillmore, brother; Juanita Lee Sobrania, sister; John Torres, (relationship not stated); Florinda Torres, (relationship not stated). Petition is marked at Item 3(d)(1) asserting that the Special Administrator is the named executor and the Will waives bond. Bond of \$434,000.00 should be posted (estimated value of personal property), particularly in light of the fact that (a) Petitioner is a non-resident of California (resides in South Dakota) and Court may require bond if the proposed personal representative resides outside California or for other good cause, even if the will waives bond, pursuant to California Rule of Court 7.201(b) and Probate Code § 8571; and (b) there are objections to the validity of the Will.
<input type="checkbox"/> Aff. Posting		Reviewed by: LEG
<input type="checkbox"/> Status Rpt		Reviewed on: 12/11/13
<input type="checkbox"/> UCCJEA		Updates:
<input type="checkbox"/> Citation		Recommendation:
<input type="checkbox"/> FTB Notice		File 21 – Gomes

Petitioner states, continued:

- Petitioner requests per Probate Code § 8540 to be appointed special administrator to perform the following but not exclusive acts: transfer Decedent's bank account to the estate's name to pay bills relating to the maintenance of the estate real property including paying house insurance, utilities, alarm system, property taxes, and yard care; paying car insurance on Decedent's car, and the power to reimburse all individuals that have made payments on any of the listed expenses relating to the properties with proof of payment;
- Petitioner further requests that he be given authority to hire an independent contractor to clean the carpets and hire a pest control company to mitigate the bugs and roach problem on the property.

NEEDS/PROBLEMS/COMMENTS, continued:

3. Need *Affidavit of Publication*. Petitioner requests appointment as Special Administrator with Limited IAEA authority. Pursuant to Probate Code §8545 notice shall be the same as under Probate Code §8003, which includes publication under Probate Code § 8120 et seq. However, Petitioner may be appointed special administration without the necessity of publication if Petitioner is appointed **with** bond and **without** Limited IAEA authority.
4. Proposed order submitted by Petitioner does not but should include Attachment 3d(2) identifying the special powers requested by Petitioner to be granted to him as special administrator.

Note: If *Petition* is granted, Court will set status hearing as follows:

- **Friday, December 20, 2013 at 9:00 a.m. in Dept. 303 for filing of proof of bond.**

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

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

Age: 7	<u>GENERAL HEARING 02/04/2014</u>	NEEDS/PROBLEMS/COMMENTS:
	CONNIE JIMENEZ , maternal aunt is petitioner.	<ol style="list-style-type: none"> 1. Need proof of personal service five (5) Court 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"> • Andrew Brown (Father) 2. Proof of personal service on the father, Andrew Brown, was not signed. 3. Consent and Waiver of Notice signed by the mother, Cynthia Valdez, filed 12/11/2013 appears to be a copy. Need original.
	Father: ANDREW BROWN ,	
Cont. from	Mother: CYNTHIA VALDEZ , Consents and Waives Notice filed 12/11/2013	
<input type="checkbox"/> Aff.Sub.Wit.	Paternal Grandfather: Cornelius Polk, Deceased	
<input checked="" type="checkbox"/> Verified	Paternal Grandmother: Diane Polk, Deceased	
<input type="checkbox"/> Inventory	Maternal Grandfather: Robert Valdez	
<input type="checkbox"/> PTC	Maternal Grandmother: Janet Marie Jimenez	
<input type="checkbox"/> Not.Cred.	Petitioner states: temporary guardianship is essential as the mother, Cynthia Valdez, is dying of terminal Stage 4 cancer; her death is imminent. Petitioner states that the child's father, Andrew Brown, is in his life and is very loving, however petitioner is seeking to share legally with the father in order to be helpful to him after the mother's death. She states that the father is a good care taker and she is not seeking to take custody of the child from the father but she wants to be a co-parent, she wants to be a mother figure to the child.	
<input checked="" type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv.		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LV
		Reviewed on: 12/11/2013
		Updates: 12/11/2013
		Recommendation:
		File 22 – Brown

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

Age: 10	GENERAL HEARING 02/04/2014	NEEDS/PROBLEMS/COMMENTS:
	ANDREW BROWN , mother's fiancé, and CONNIE JIMENEZ , maternal aunt are petitioners.	<p>4. Need proof of personal service five (5) Court days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:</p> <ul style="list-style-type: none"> • Andrew Brown (Father) • Biological Father (Not Listed) <p>*Note: Petition lists the father as Andrew Brown however in the pleadings it is stated that the biological father is unknown and is believed to be incarcerated.</p>
Cont. from	Father: ANDREW BROWN*	
<input type="checkbox"/> Aff.Sub.Wit.	Mother: CYNTHIA VALDEZ , Consents and Waiver of Notice filed 12/13/2011	
<input checked="" type="checkbox"/> Verified	Paternal Grandfather: Cornelius Polk, Deceased	
Inventory	Paternal Grandmother: Diane Polk, Deceased	
PTC	Maternal Grandfather: Robert Valdez	
Not.Cred.	Maternal Grandmother: Janet Marie Jimenez	
<input checked="" type="checkbox"/> Notice of Hrg	Petitioners state: it is vital that petitioner's obtain temporary guardianship of the minor as mother, Cynthia Valdez, has been diagnosed with Stage 4 cancer and her death is imminent, she may not live to the hearing. The biological father has not been in the child's life for the entirety of it and has not seen the child since the age of three. The biological father is believed to be incarcerated in California. The mother is anxious for the child to have guardians prior to her death, which could come at any moment. Proposed guardian, Andrew Brown, has helped raise the minor and has been his father figure nearly the entirety of his life.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	x	
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 12/11/2013
		Updates: 12/11/2013
		Recommendation:
		File 23 – Robinson

Status Hearing Re: Receipt of Assets from the Estate

Age: 18 years	<p>DELIA GONZALEZ, paternal aunt, RAFAEL DE LA MORA MARTIN and MARIA DE JESUS GOMEZ MUNOZ, paternal grandparents were appointed guardians of the person on 10/31/12.</p> <p>DELIA GONZALEZ was appointed guardian of the estate on 10/31/12.</p> <p>Letters issued on 10/31/12.</p> <p>This status hearing was set to inform the court of the status of the assets to be received from the estates of the minor's deceased parents Lorena De La Mora (page 8) and Francisco De La Mora (page 9).</p> <p>Status Report filed on 12/6/13 states no assets have been received from the estates of the minor's deceased parents.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cont. from 120613		
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: 12/10/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 24 – De La Mora</p>	

Status Hearing Re: Receipt of Assets from the Estate

Age: 16 years	<p>DELIA GONZALEZ, paternal aunt, RAFAEL DE LA MORA MARTIN and MARIA DE JESUS GOMEZ MUNOZ, paternal grandparents were appointed guardians of the person on 10/31/12.</p> <p>DELIA GONZALEZ was appointed guardian of the estate on 10/31/12.</p> <p>Letters issued on 10/31/12.</p> <p>This status hearing was set to inform the court of the status of the assets to be received from the estates of the minor's deceased parents Lorena De La Mora (page 8) and Francisco De La Mora (page 9).</p> <p>Status Report filed on 12/6/13 states no assets have been received from the estates of the minor's deceased parents.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cont. from 120613		
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: 12/10/13
		Updates:
		Recommendation:
		File 25 – De La Mora

