



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.

Probate Status Hearing RE: Report from the Public Guardian as to Whether or not a Probate Conservatorship is Appropriate

	DEBORAH GONZALES , mother, was appointed conservator of the person, on 4/5/01.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Report of the Public Guardian was not served on all interested parties. Court Investigator's Report dated 11/20/16 indicates Mr. Gonzales is unable to read or write. The court may require more information regarding his signing a rental agreement.
	Minute order dated 2/1/16 states the Court allows resignation of Deborah Gonzales as conservator of the person and appoints the Public Guardian as successor conservator of the person. This status hearing was set for a report from the Public Guardian as to whether or not a probate conservatorship is appropriate.	
	Report of Public Guardian and Declaration of Deputy Public Guardian Joshua Cochran filed on 4/28/16	
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		Reviewed by: KT
		Reviewed on: 5/4/16
		Updates:
		Recommendation:
		File 1- Gonzales

Page 2

Reimbursement: Petitioner states the decedent's house was built in 1925 and routine maintenance had not been performed for many years. Repairs were needed to be able to sell the home with profit to the estate. The appraisal came in high, as the decedent died in 2006 when the market was on the rise. An offer for \$100,000 was accepted in December 2006, but the buyer could not obtain financing for a house in such condition and no cash offers could be procured that were acceptable and profitable to the estate. From 2007-2010, the real estate market crashed and it was during that time that homes were lost to foreclosure and the seller's market had become very limited.

Executor felt it would be in the best interest of the estate to make repairs, rent the property, and wait for the market to rebound. Repairs included new roof, a/c, electricity, new walls, new foundation, new siding, paint, plumbing, door replacement, flooring, kitchen, bathroom, fixtures, smoke alarms, windows, window coverings, tree trimming, outdoor lighting, etc.

The house was rented from July 2011 to June 2014. By this time, the real estate was on the mend and the house was then prepared for sale and sold in March 2015.

Due to the fact that there was no cash in the estate, Executor advanced costs of repairs in the amount of \$58,534.44 as set forth in Exhibit B.

Petitioner states Department of Health Care Services filed a Creditor's Claim in the amount of \$63,885.05 on 1/27/16, and through negotiations has agreed to accept distribution of the remaining cash after payment of fees and costs and will not be requesting liquidation of the stamp collection.

Petitioner states DHCS is agreeable to distribution of the stamp collection to the sole beneficiary of the estate, which is Bethesda Lutheran Communities, Inc., of Watertown, WI; however, when request was made by the attorney for DHCS to provide written acknowledgment of this agreement, the attorney's office was told it was not the practice of their office to provide such written confirmation and that by not objecting to the distribution agreement after notice of hearing and service of a copy of the petition stating the agreement, would serve as their acceptance.

Proposed Distribution: Pursuant to the Creditor's Claim and the Decedent's will, the estate will be distributed as follows:

- **Dept. of Health Care Services:** \$29,150.75, as partial payment of the claim, with the first \$34,734.30 of any other thereafter discovered property until the claim is fully satisfied. (See Note #3.)
- **Bethesda Lutheran Communities, Inc.:** Stamp collection valued at \$1,500.00

Attorney
Attorney

Salazar, Steven F. (for Trustee Steven R. Thomas, II)
Bagdasarian, Gary G. (for former Co-Trustee Kristy Helm Thomas)

Petition for Settlement of First and Final Account, Approval of Trustee Acts and Distribution of Trust Assets and Attorneys' Fees and Costs

DOD: 1/19/12	<p>STEVEN R. THOMAS, II, Trustee, is Petitioner.</p> <p>Account period: 11/1/12 – 2/29/16 Accounting: \$178,342.19 Beginning POH: \$169,217.03 Ending POH: \$107,054.01</p> <p>Petitioner states Pursuant to Order Approving Settlement Agreement entered 6/25/13, the following parties are entitled to receive a one-eighth share of the trust estate:</p> <ul style="list-style-type: none"> • Steven R. Thomas, II • Kristi Helm-Thomas • Kelby Renee Helm (a minor) • Michael Garrett Davis (a minor) • Steven Ernest Helm, III (a minor) • Steven Rex Thomas (a minor) • Jackson Alan Thomas (a minor) • Alexis Leigh Thomas (a minor) <p>Preliminary distributions: Pursuant to the settlement agreement, preliminary distributions were made as follows:</p> <ul style="list-style-type: none"> • Kristi Helm-Thomas: \$4,000.00 • Steven R. Thomas II: \$4,816.95 (reimburse for funeral expenses) <p>Property Disbursed: During administration, Kristi Helm-Thomas and Steven Thomas, II disbursed to themselves or on their behalf and/or retained in their possession certain personal property, which is to be allocated towards their distributive shares as set forth in the petition. (List includes certain inventoried assets, reimbursement for expenses, etc.)</p> <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p>	NEEDS/PROBLEMS/COMMENTS:
		<u>SEE ADDITIONAL PAGES</u>
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		Reviewed by: skc
		Reviewed on: 5/4/16
		Updates:
		Recommendation:
		File 3- Thomas

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Attorney Salazar: \$10,774.50 (\$10,000.00 plus \$774.50 in costs)

Declaration filed 3/28/16 provides itemization of 82.65 hours @ \$250/hr, totaling \$20,662.50 for services from 1/25/12 to 3/13/16 as attorney for Trustee Steven R. Thomas, II; however, attorney is willing to accept \$10,000, plus \$774.50 in costs.

Attorney Bagdasarian: \$9,563.00 (\$9,362.00 plus \$201 in costs)

Declaration filed 2/16/16 provides itemization of 51.1 hours and separately 23.8 hours @ \$250/hr for services from 2/6/12 through 6/27/13 as attorney for Kristi Helm-Thomas, former Co-Trustee.

Attorney Helon: \$5,535.00 (\$5,100.00 plus \$435 in costs)

Itemization at Exhibit D reflects total fees incurred of \$10,207.65 as GAL for certain minor beneficiaries; however, attorney is willing to accept \$5,100, plus \$435 in costs.

Closing: \$1,500.00**Proposed Distribution:**

- Steven R. Thomas II: \$3,506.17 (\$12,388.25 less advance/retained assets of \$8,882.08)
- Kristi Helm-Thomas: \$1,832.78 (\$12,388.25 less advance/retained assets of \$10,555.47)
- Kelby Renee Helm (minor): \$12,388.25
- Steven Ernest Helm, III (minor): \$12,388.25
- Michael Garrett Davis (minor): \$12,388.25
- Steven Rex Thomas (minor): \$12,388.25
- Jackson Alan Thomas (minor): \$12,388.25
- Alexis Leigh Thomas (minor): \$12,388.25

Pursuant to the Settlement Agreement, and to avoid the expenses of guardianship of the estate, Petitioner requests that the shares of minor beneficiaries Steven E. Helm, III, Steven Rex Thomas, Jackson Alan Thomas, and Alexis Leigh Thomas, be deposited subject to a Guardian ad Litem into blocked accounts at EECU subject to withdrawal only on authorization of the Court.

Petitioner requests that the shares of minor beneficiaries Michael Garret Davis and Kelby Renee Helm, in order to avoid the expenses of guardianship of the estate and due to disabilities of said minors, Petitioner requests that the shares of Michael Garret Davis and Kelby Renee Helm be deposited in a blocked account at EECU subject to withdrawal only on authorization of the Court.

SEE ADDITIONAL PAGES

Page 3

Petitioner requests an Order:

1. Finding that all facts stated in the Petition are true and correct and that all notices required by law have been duly given;
2. Finding that the Court has received full disclosure regarding the relationship between Marvin T. Helon, Guardian ad Litem, and Steven E. Helm, III, Steven Rex Thomas, Jackson A. Thomas, and Alexis L. Thomas, minors, and with regard to all matters related to the petition there is no conflict of interest; such Guardian ad Litem has adequately represented the minors as to all matters regarding the Petition; and general family benefits will accrue to the living members if (sic) the family of the minors upon the grating of the Order.
3. That this account and report be settled, allowed and approved, and all acts and transactions of Petitioner relating to matters set forth therein be ratified, confirmed and approved;
4. That the property of the trust estate be distributed as set forth therein;
5. That Attorney Steven F. Salazar for Petitioner/Trustee Steven R. Thomas II be allowed compensation for his services and costs of \$10,774.50;
6. That Attorney Gary D. Bagdasarian for former Co-Trustee Kristy Helm-Thomas be allowed compensation for his services and costs of \$9,563.00;
7. That Attorney Marvin T. Helon, Guardian ad Litem for minors Steven E. Helm, III, Steven Rex Thomas, Jackson Alan Thomas, and Alexis Leigh Thomas, be allowed compensation for his service and costs of \$5,535.00;
8. That the sum of \$12,388.26 to each of the minors subject to a Guardian ad Litem, namely Steven E. Helm, III, Steven Rex Thomas, Jackson Alan Thomas, and Alexis Leigh Thomas, representing each's one-eighth (1/8) share of the estate, be deposited in the name of said minors in an interest-bearing account at EECU. No part of the money so deposited shall be withdrawn except on order of the Court until said minor reaches the age of majority, after which age all money shall be paid to the minor without further order of the Court;
(Examiner's Note: Order indicates withdrawal at age 25, per the trust.)
9. That the sum of \$12,388.26 each to minors Michael Garret Davis and Kelby Renee Helm shall be deposited in the name of said minors in an interest-bearing account at EECU. No part of the minor so deposited shall be withdrawn except on order of the Court until said minor reaches the age of majority, after which age all money in the account shall be paid to the minor without further order of the Court;
(Examiner's Note: Order indicates withdrawal at age 25, per the trust. Also note: There does not appear to be any difference in this distribution to those at #8 above.)
10. That Petitioner be allowed to withhold \$1,500 from distribution for purposes of paying closing costs of Administration and as a reserve for liabilities of the Trust, with any unexpended portion to be distributed to the beneficiaries in fractional interests without further order of the Court; and
11. Such other and further orders be made as this Court may deem proper under the circumstances.

SEE ADDITIONAL PAGES

Page 4 - NEEDS/PROBLEMS/COMMENTS:

1. Petitioner states an Amended I&A was served on the parties reflecting an amended beginning trust value of \$169,217.03; however, it does not appear this Amended I&A was filed. The Court may require a copy. (I&A filed 5/16/13 reflects a total beginning trust value of \$172,351.18.)
2. The Ending POH according to the Summary of Account is \$107,054.01; however, Schedule Q indicates the Ending POH is \$107,041.01, and the disbursement schedule is based on this amount, which is \$13.00 less. Which figure is correct, and are distribution amounts affected?
3. Petitioner requests approval of all acts and transactions; however, it appears from the petition and disbursements schedule that Petitioner Steven Thomas II and Kristi Helm-Thomas frequently used the trust accounts for personal expenses, resulting in overdraft fees on multiple occasions. Although Petitioner requests that these amounts "disbursed/retained" be charged against their shares, this accounting reflects inappropriate fiduciary management to the detriment of the other heirs, since those funds would have been earning interest had they not been advanced during administration. Therefore, the Court may strike any language approving such acts/transactions.
4. Certain minor beneficiaries were served "C/O" Attorney Marvin T. Helon, who was appointed their Guardian ad Litem on 9/24/12. However, direct notice to the minors and the persons having custody of the minors is required by Cal. Rule of Court 7.51 (d). The Court may require proper notice to:
 - Steven E. Helm, III;
 - Steven Rex Thomas;
 - Jackson Alan Thomas;
 - Alexis Leigh Thomas; and
 - Parents or guardians of the above minors.
5. Beneficiary Kristy Helm-Thomas was served "C/O" her attorney Gary D. Bagdasarian. However, direct notice is required by Probate Code § 1214 and Cal. Rule of Court 7.51 (a) and (b). The Court may require proper notice to Kristy Helm-Thomas.
6. Minor Beneficiary Kelby Helm was served "C/O" Kristy Helm-Thomas. However, direct notice to the minor is required by Cal. Rule of Court 7.51 (d). The Court may require proper notice to Kelby Helm.
7. Minor Beneficiary Michael Garrett Davis was served "C/O" Steven R. Thomas, II. However, direct notice to the minor is required by Cal. Rule of Court 7.51 (d). The Court may require proper notice to Michael Garrett Davis.

SEE ADDITIONAL PAGES

Page 5 - NEEDS/PROBLEMS/COMMENTS (Cont'd):

8. **Need clarification re the proposed distribution of certain minors' shares with reference to the Settlement Agreement, which states at Paragraph 1:** *"The distribution to the minors ... shall be paid to each grandchild's trust, which trusts are to be terminated and the respective shares placed into blocked accounts, subject to withdrawal only upon further court order. However, the amounts distributed to trusts for **Michael Garret Davis** and **Steven Rex Thomas** shall be retained in special needs trusts, as provided for by the terms of the Trust."*

It appears the Settlement Agreement may be referring to Article VII, Paragraph 8a of the trust, however, the language therein does not appear to specifically establish third party special needs trusts; rather, it appears to provide for discretion in distributions by the trustee.

The Petition references disabilities of **Michael Garret Davis** and **Kelby Renee Helm**, but their proposed distribution does not appear different from the other minors, and these are not the same two minors for whom the Settlement Agreement appears to propose special needs trusts.

9. If two of the minors' shares, subject to clarification of which two, are required to be distributed to special needs trusts pursuant to the Settlement Agreement, then such SNTs would need to be established by petition pursuant to Probate Code §3600 et seq., since the decedent's trust itself does not appear to contain provisions establishing third party special needs trusts.
10. Need mandatory Judicial Council Form MC-355 Order to Deposit Money Into Blocked Account for each minor's share to be held as such, subject to clarification of the above-noted issues.

4 Miah Morningstar, Ellie Hobson, Lola Aguirre-Hobson (GUARD/P)
Case No. 12CEPR01031

Petitioner: Jackie Aguirre-Bittner (pro per)
 Petitioner: Clinton Bittner (pro per)

Petition for Appointment of Guardian of the Person

		TEMPORARY EXPIRES 5/9/16	NEEDS/PROBLEMS/COMMENTS:
		JACKIE AGUIRRE-BITTNER , maternal grandmother and CLINTON BITTNER , maternal step-grandfather, are petitioners.	This petition is as to ELLIE and LOLA only. Petitioners were previously appointed guardians of Miah on 1/16/13.
Cont. from 041816			
<input type="checkbox"/>	Aff.Sub.Wit.	Please see petition for details.	<p>Continued from 4/18/16. Minute order states Petitioners are to continue to make attempts to locate Oscar Villareal; the Court will consider text or Facebook notice that contains all of the pertinent information.</p> <p>1. Need proof of service of the Notice of Hearing along with a copy of the petition or consent and waiver of notice or declaration of due diligence on:</p> <ul style="list-style-type: none"> a. Unknown paternal grandfather b. Oscar Villarreal, maternal grandfather – unless the court dispenses with notice.
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<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 5/4/16
			Updates:
			Recommendation:
			File 4- Morningstar/ Hobson/ Aguirre- Hobson

Status RE: Filing of an Amended Petition

	<p>ROCHELLE ROSENBALM, Conservator with bond of \$774,480.48, filed her First and Final Account on 2/16/16.</p> <p>Examiner Notes indicated various deficiencies.</p> <p>At hearing on 3/28/16, the Court set this status hearing for the filing of an amended petition.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need amended first/final account per Minute Order 3/28/16 or written status report per Local Rule 7.5.</p>
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		Reviewed by: skc
		Reviewed on: 5/4/16
		Updates:
		Recommendation:
		File 5- Keehn

6 Derek Folsom & Jordan Folsom (GUARD/P) Case No. 14CEPR00727

Petitioner Shirey, Amber Dawn (Pro Per – Mother)

Petition for Visitation

		AMBER SHIREY, mother, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Minute Order of 03/07/2016: Amber Shirley called the Clerk's office to state that one of the minors is in the hospital, and that both she and the guardian were going to the hospital this morning.
		See petition for details.	
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			Reviewed by: LV
			Reviewed on: 05/04/2016
			Updates:
			Recommendation:
			File 6- Folsom

Probate Status Hearing Re: First or Final Account

DOD: 8/30/2014	<p>RANDAL MARTIN, son, was appointed administrator with Limited IAEA with bond to be determined on 3/9/2015. <i>Letters</i> first issued on 3/10/2015. <i>First Amended Letters</i> were issued 3/25/2015.</p> <p>Final inventory and appraisal filed 3/30/2015 shows an estate valued at \$345,000.00.</p> <p>Minute order dated 3/9/2015 set this status hearing for the filing of the First Account or Petition for Final Distribution.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</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>
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		Reviewed on: 5/4/2016
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		Recommendation:
		File 8- Martin

Petitioner

Padilla, Henry Michael, Jr. (Pro Per – Son – Petitioner)

Petition for Letters of Administration; Authorization to Administer Under IAEA

(Prob. C. 8002, 10450)

DOD: 12/7/14		<p>HENRY MICHAEL PADILLA, JR., Son, is Petitioner and requests appointment as Administrator with Full IAEA without bond.</p> <p>All heirs waive bond (?? - See note)</p> <p>Full IAEA – ok</p> <p>Decedent died intestate</p> <p>Residence: Fresno Publication: Business Journal</p> <p>Estimated value of estate: Personal property: \$1,000.00 Real property: \$155,000.00 Total: \$156,000.00</p> <p>Probate Referee: Rick Smith</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 5/4/15, 7/20/15, 8/31/15, 9/28/15, 1/4/16</u></p> <p><u>Note: This is the seventh (7th) hearing on this petition. The following issue has now been updated:</u></p> <p style="text-align: center;"><u>SEE PAGE 2</u></p>	
Cont. from 050415, 072015, 083115, 092815, 010416, 022216				
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		Updates:		
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		File 9 - Padilla		

Page 2 - NEEDS/PROBLEMS/COMMENTS (Updated 5/4/16):

Note: Declaration of Michelle Nino filed 8/17/15 states she is one of two children of the decedent and waives NOTICE and also waives ANY INTEREST in the estate (*emphasis in original*). This declaration appears to be an irrevocable disclaimer of interest as discussed in Probate Code §§ 265, 275 et seq.

Pursuant to Probate Code §282, a disclaimer, when effective, is irrevocable and binding, and the disclaimed interest shall descend to the issue of the disclaimant as if the disclaimant had predeceased the decedent.

Petitioner has now provided the names, ages, and addresses of Ms. Nino's two children in his Declaration filed 5/4/16.

Because Ms. Nino has disclaimed her interest in the estate, her two children (both adults) are now heirs.

Therefore:

- 1. Need proof of service of Notice of Petition to Administer Estate (DE-121) pursuant to Probate Code §§ 8100, 8110 on Tim Nino and Jacqueline Nino.**
- 2. Need waivers of bond from Tim Nino and Jacquelyn Nino, or bond of \$156,000.00.**

Note: If granted, the Court will set status hearings as follows:

- **Monday, June 20, 2016 for filing of bond, if required**
- **Monday, July 11, 2016 for filing the Inventory and Appraisal**
- **Monday, April 10, 2017 for filing the first account or petition for final distribution.**

If the proper items are filed prior to the status hearing dates pursuant to Local Rule 7.5, the status hearings may come off calendar.

Petitioner: Terrance Bryant (pro per)

Guardian: Dayna Lynnette Wood (pro per)

Petition for Termination of Guardianship

		TERRANCE BRYANT , father, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service of the Notice of Hearing on: <ol style="list-style-type: none"> a. Dayna Wood (guardian) b. Sabrina Frith (mother) c. Terrance Bryant (paternal grandfather) Shantel Standifer (paternal grandmother) d. Kenneth Frith (maternal grandfather) e. Tracy Jones (maternal grandmother) 	
		DAYNNA WOOD , non-relative, was appointed guardian on 1/26/16.		
		Please see petition for details.		
Cont. from		<p>Court Investigator Report filed on 4/25/16</p>		
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			Reviewed by: KT	
			Reviewed on: 5/4/16	
			Updates:	
			Recommendation:	
			File 10- Bryant	

Status RE: Assessment by the Public Administrator's Office

DOD: 6/21/15	SPECIAL ADMINISTRATION EXPIRES 5/9/16	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need report from Public Administrator per Minute Order 3/28/16. 2. If it appears that this estate will require administration, a new petition will need to be filed, with proper notice, publication, proof of will, etc., since Mr. Sandoval's petition was deficient in those aspects and was denied and dismissed. <p>Note: Mr. Sandoval's petitions were filed with a fee waiver. If assets are recovered/distributed pursuant to this estate, all fees will be due to the Court.</p> <p>Note: Two Creditor's Claims have been filed in this estate, as well as a Notice of Lien by CourtCall, LLC.</p>
	<p>FRESNO COUNTY PUBLIC ADMINISTRATOR was appointed as Special Administrator pursuant to Minute Order 3/28/16 to assess the estate as to whether or not there are any assets or if any lawsuits need to be pursued.</p> <p>Letters of Special Administration issued on 4/21/16. See Order signed 4/20/16.</p> <p>Background: JOSEPH G. SANDOVAL, Beneficiary, filed a Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Estate under IAEA on 1/4/16.</p> <p>The Petition requested that the decedent's holographic will dated 6/7/95 be admitted to probate and estimated the value of the estate as follows: Personal property: \$10,000 Real property: \$45,000 (\$230,000 less encumbrance of \$185,000) Total: \$55,000.</p> <p>Mr. Sandoval also filed an Ex Parte Petition for Letters of Special Administration to obtain information in connection with certain transactions described in the Ex Parte Petition. (See document for details.) However, he was unable to appear at the hearing and the Ex Parte Petition for Letters of Special Administration was denied on 1/25/16.</p> <p>At the continued hearing on the Petition for Probate of Will on 3/28/16, the petitioner requested that the Public Administrator be appointed. The Court so ordered and set this status hearing re assessment of the estate.</p>	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<p>Reviewed by: skc</p> <p>Reviewed on: 5/5/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 12- Watson</p>

Petition for Letters of Administration; Authorization to Administer Under Limited IAEA

DOD: 2/3/2016	CAROL DONALDSON , sister, is petitioner and requests appointment as Administrator with Limited IAEA without bond	NEEDS/PROBLEMS/COMMENTS: Note: If granted, the Court will set status hearings as follows: <ul style="list-style-type: none"> • Tuesday, October 11, 2016 for filing Inventory and Appraisal • Tuesday, July 11, 2017 for filing the first account or petition for final distribution
Cont. from 032816	All heirs waive bond	
<input type="checkbox"/> Aff.Sub.Wit.	Limited IAEA – o.k.	
<input checked="" type="checkbox"/> Verified	Decedent died intestate	
<input type="checkbox"/> Inventory	Residence: Coalinga Publication: Business Journal	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	Estimated value of Estate (less encumbrances):	
<input checked="" type="checkbox"/> Aff.Pub.	Personal property \$ 18,000.00	
<input type="checkbox"/> Sp.Ntc.	Annual gross income: \$ 0.00	
<input type="checkbox"/> Pers.Serv.	Real property: \$ 10,000.00	
<input type="checkbox"/> Conf. Screen	Total: \$ 28,000.00	
<input checked="" type="checkbox"/> Letters	Probate Referee: Steven Diebert	
<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 type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: SEF
		Reviewed on: 5/5/2016
		Updates:
		Recommendation:
		File 15- Phillips

Petitioner: Diana Moreno (pro per)

Petition for Appointment of Guardian of the Person

		<u>TEMPORARY EXPIRES 5/9/16</u>	NEEDS/PROBLEMS/COMMENTS:
		DIANA HERNANDEZ MORENO , paternal grandmother, is petitioner.	<ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service of the Notice of Hearing along with a copy of the petition or consent and waiver of notice or declaration of due diligence on: <ol style="list-style-type: none"> a. Mark Anthony Moreno (father) b. Naydine Brazen (mother) 3. Need proof of service of the Notice of Hearing along with a copy of the petition or consent and waiver of notice or declaration of due diligence on: <ol style="list-style-type: none"> a. Mark Anthony Moreno (paternal grandfather) 4. #1c(1) and 1c(2) of the Child Information Attachment to the Petition was not answered re: whether or not the child is a member of an Indian Tribe or whether or not the child may be an Indian child. 5. #8 of the Child Information Attachment to the Petition was not completed re Indian child inquiry.
		Please see petition for details.	
Cont. from		Court Investigator Report filed on 4/21/16.	
<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	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Aff.Mail	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 5/4/16
			Updates:
			Recommendation:
			File 16- Moreno

Petitioner Jennifer Ann Swartzbaugh (Pro Per, non-relative)
 Petitioner Tolbert Campbell (Pro Per, non-relative)

Petition for Appointment of Guardian of the Person

		NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
		TOLBERT J. CAMPBELL, and, JENNIFER A. SWARTZBAUGH, non-relatives, are Petitioners.	1. <i>If Court does not find due diligence per the Declaration filed 3/7/2016, need Notice of Hearing and proof of personal service for:</i>
Cont. from		<i>~Please see Petition for details~</i>	• Jose Antonio Martinez , father.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Court Investigator filed the <i>Report of DSS Social Worker</i> , on 4/29/2016.	2. Need proof of service by mail of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian</i> , or <i>Consent to Appointment of Guardian and Waiver of Notice</i> , or a <i>Declaration of Due Diligence</i> , for:
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		• paternal grandparents;
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	<input checked="" type="checkbox"/>	• Deborah Sue Kirkpatrick, maternal grandmother, <i>if Court does not find due diligence per the Declaration filed 3/7/2016;</i>
<input type="checkbox"/>	Aff.Mail	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Aff.Pub.		• Saphira Baker, sibling, if age 12 or over.
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Conf. Screen		Reviewed by: LEG
<input checked="" type="checkbox"/>	Letters		Reviewed on: 5/4/16
<input checked="" type="checkbox"/>	Duties/Supp		Updates:
<input type="checkbox"/>	Objections		Recommendation:
<input type="checkbox"/>	Video Receipt		File 18- Kirkpatrick
<input checked="" type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	Clearances		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Attorney Susan K. Arthur (for Petitioner Florencio Levario)

Petition to Determine Succession to Real Property and Personal Property

DOD: 12/29/2015	FLORENCIO LEVARIO , brother, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Pursuant to Probate Code § 13153, need proof of mailed service of <i>Notice of Hearing</i> for all persons required to be served with notice pursuant to Probate Code § 13152(a)(7). (Note: <i>Proof of Service by Mail</i> filed 3/28/2016 shows Petitioner has already been served with notice as required.) <i>Attachment 11</i> to the <i>Petition</i> does not state the amount (percentage) of the <u>Decedent's</u> interest in the real and personal property as required per Item 11 of the <i>Petition</i>. <i>Attachment 14</i> to the <i>Petition</i> does not but should state the relationship to Decedent of the two persons listed. Need revised <i>Attachment 14</i> to the <i>Petition</i> containing this information for the persons listed. <i>Attachment 14</i> to the <i>Petition</i> is incomplete, as it does not list the name and date of death of Decedent's spouse pursuant to Local Rule 7.1.1(D) (only the date of death handwritten into Item 9 of the <i>Petition</i> is insufficient.) Item 15 of the <i>Petition</i> does not list all persons named as executors in Decedent's Will (alternate named executors should be listed in Item 15 of the <i>Petition</i> and provided with notice.)
Cont. from	40 days since DOD.	
<input type="checkbox"/> Aff.Sub.Wit.	S/ P	
<input checked="" type="checkbox"/> Verified	No other proceedings.	
<input checked="" type="checkbox"/> Inventory		
PTC	I & A - \$117,500.00	
Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	W/	
Aff.Pub.	Will dated 2/7/1991 devises the residue of the estate to the Petitioner.	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Petitioner requests Court determination that Decedent's [unspecified %] interest in real property located at 1401 Hoag Street, Sanger, and Decedent's [unspecified %] interest in personal property, passes to the Petitioner pursuant to Decedent's Will.	
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LEG
		Reviewed on: 5/4/16
		Updates:
		Recommendation:
		File 19- Levario

Petition for Authorization to Consent to Necessary Medical Treatment

Age:		NEEDS/PROBLEMS/COMMENTS: <p style="text-align: center;"><u>OFF CALENDAR</u></p> Matter rescheduled for 5/4/16 at 10:30 am.
DOD:		
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: skc
		Reviewed on: 5/2/16
		Updates:
		Recommendation:
		File 20- Jaimes

Petitioner Henry Pham (Pro Per, spouse)
 Petitioner Carol Pham (Pro Per, daughter)
 Petitioner Thuy Nguyen(Pro Per, daughter)
 Petitioner Annale Montalvo (Pro Per, daughter)
 Petitioner Jimmy Nguyen (Pro Per, son)
 Petitioner Kathy Pham (Pro Per, daughter)

Petition to Determine Succession to Real Property

DOD: 6/3/2011	HENRY PHAM, spouse, CAROL PHAM, THUY NGUYEN, ANNALE MONTALVO, JIMMY NGUYEN, and KATHY PHAM, children, are Petitioners.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Attachment 13 to the Petition contains a proposed distribution that is incorrect. Probate Code § 6401 provides the intestate share of the surviving spouse is 1/3 of the estate where the Decedent leaves more than one child, and Probate Code § 6402 provides that the part of the intestate estate not passing to the surviving spouse passes to the issue of the Decedent in equal shares (that is, 2/3 to be divided equally between Decedent's 5 children.)</p> <p>2. Proposed order contains the incorrect distribution in Item 9(b).</p>
Cont. from	40 days since DOD.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	No other proceedings.	
<input checked="" type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	I & A - \$115,000.00	
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	W/ Decedent died intestate.	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Petitioners request Court determination that Decedent's 100% interest in real property located at 4482 E. Home Ave., Fresno, passes to the Petitioners, at [1/2 interest] to Henry Pham (spouse), and [1/10 interest] each to Decedent's children, pursuant to intestate succession.	
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LEG
		Reviewed on: 5/5/16
		Updates:
		Recommendation:
		File 21- Nguyen

Attorney Flora Istanbulian (for Petitioner Philip Blohm, CPA)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA

DOD: 3/4/2016	PHILIP BLOHM, CPA , named Executor without bond, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: If <i>Petition</i> is granted, Court will set Status Hearings as follows:</p> <ul style="list-style-type: none"> • Wednesday, October 5, 2016, at 9:00 a.m. in Dept. 303 for the filing of the final inventory and appraisal; and • Wednesday, July 5, 2017, at 9:00 a.m. in Dept. 303 for the filing of the first account and/or petition for final distribution. <p>Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.</p>
Cont. from	Full IAEA: OK	
<input type="checkbox"/> Aff.Sub.Wit. S/P		
<input checked="" type="checkbox"/> Verified	Will Dated: 8/6/2012	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Residence: Fresno	
<input checked="" type="checkbox"/> Notice of Hrg	Publication: Business Journal	
<input checked="" type="checkbox"/> Aff.Mail W/		
<input checked="" type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.	Estimated value of the Estate:	
<input type="checkbox"/> Pers.Serv.	Real property - \$63,568.00	
<input type="checkbox"/> Conf. Screen	Personal property - \$ 5,000.00	
<input checked="" type="checkbox"/> Letters	Total - \$68,568.00	
<input checked="" type="checkbox"/> Duties/Supp	Probate Referee: Rick Smith	
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LEG
		Reviewed on: 5/4/16
		Updates:
		Recommendation: SUBMITTED
		File 22- Noroyan

23 Arnold R. Williams (Estate)

Case No. 16CEPR00339

Attorney Bagdasarian, Gary G. (for Lisa Michelle William-Taylor – Petitioner – Daughter)

Petition for Letters of Administration; Authorization to Administer Under the IAEA

DOD: 02/27/2016	LISA MICHELLE WILLIAM-TAYLOR , daughter is petitioner and requests appointment as Administrator without bond.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Petition lists the petitioner as being a resident of California however attachment 3d(2) of the Petition states "even though she is a resident of Chicago, Illinois, bond should not be required as she is the sole beneficiary." Is petitioner a resident of California or Illinois? If proposed personal representative is a resident of Illinois. Probate Code 8571 states notwithstanding a waiver of bond, the court in its discretion may require a nonresident personal representative to give a bond in an amount determined by the court. <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> Monday, 06/06/2016 at 9:00a.m. in Dept. 303 if the Court orders bond and Monday, 10/03/2016 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and Monday, 07/03/2017 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
	Petitioner is a resident of Illinois.	
Cont. from	Petitioner is sole heir and waives bond.	
<input type="checkbox"/> Aff.Sub.Wit.	Full IAEA – o.k.	
<input checked="" type="checkbox"/> Verified	Decedent died intestate	
<input type="checkbox"/> Inventory	Residence: Fresno	
<input type="checkbox"/> PTC	Publication: The Business Journal	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail w/	Estimated value of the Estate:	
<input type="checkbox"/> Aff.Pub.	Personally property - \$1,000.00	
<input type="checkbox"/> Sp.Ntc.	Real property - \$250,555.00	
<input type="checkbox"/> Pers.Serv.	Less encumbrances - \$20,000.00	
<input type="checkbox"/> Conf. Screen	Total - \$231,555.00	
<input checked="" type="checkbox"/> Letters	Probate Referee: Rick Smith	
<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 type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
Reviewed by: LV		
Reviewed on: 05/05/2016		
Updates:		
Recommendation:		
File 23- Williams		

DOD: 04/18/2015		JOHN SLATER , surviving spouse, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> The will devises the residue of the estate to the John P. Slater and Mary D. Slater Family Trust not the surviving spouse/petitioner, therefore this procedure cannot be used. Need Notice of Hearing. Need proof of service on the Notice of Hearing on the following: <ul style="list-style-type: none"> Amy Slater Thompkins Jay Slater Eric Slater
		No other proceedings	
Cont. from		Will dated: 06/26/2002 devises the residue of the estate to the John P. Slater and Mary D. Slater Family Trust.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory	Petitioner requests Court confirmation that that the Charles Schwab account entitled John P. Slater & Mary Deaver Slater Comm/prop. pass to the petitioner.	
<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		
Reviewed by: LV			
Reviewed on: 05/05/2016			
Updates:			
Recommendation:			
File 24- Slater			

Petitioner: Richard Fessenden (pro per)

Petitioner: Cecilia Fessenden (pro per)

Petition for Appointment of Temporary Guardian of the Person

		GENERAL HEARING 6/13/16	NEEDS/PROBLEMS/COMMENTS:
		TEMPORARY EXPIRES 5/9/16	
		RICHARD FESSENDEN and CECILIA FESSENDEN , maternal grandparents, are petitioners.	Continued from 4/25/16. Minute order states William Baldwin, father, is to file and properly serve any written objections at least two court days prior to 5/9/16.
Cont. from 042516			
<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		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	X	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input 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		
			1. Need Notice of Hearing. 2. Need proof of personal service of the Notice of Hearing along with a copy of the temporary petition, or Consent and Waiver of Notice or Declaration of Due Diligence on: a. William P. Baldwin (father) b. Allison Baldwin (mother)
			Reviewed by: KT
			Reviewed on: 5/4/16
			Updates:
			Recommendation:
			File 25- Baldwin

**27 Pahoua Cha, Gina Cha Bee Cha, Achee Cha & Geo Nina Cha (GUARD)
Case No. 13CEPR01013**

Guardian: Dee Cha (pro per)
Guardian: Zoua Cha (pro per)
Petitioner: Tony Cha (pro per)
Petitioner: Toua Cha (pro per)

Petition for Appointment of Temporary Guardian of the Person

		GENERAL HEARING 7/5/15	NEEDS/PROBLEMS/COMMENTS:	
		TOUA CHA , paternal uncle and TONY CHA , paternal cousin, are petitioners.	This petition is as to PAHOUA CHA only.	
Cont. from		DEE CHA and ZOUA CHA , cousins, were appointed guardian on 3/20/14.	A Petition for Removal of Guardian has been filed and set for hearing on 7/5/16.	
<input type="checkbox"/>	Aff.Sub.Wit.	Please see petition for details.	<ol style="list-style-type: none"> There is no vacancy in the office of guardian. Need Notice of Hearing. Need proof of personal service of the Notice of Hearing along with a copy of the temporary petition or consent and waiver of notice or declaration of due diligence on: <ol style="list-style-type: none"> Dee Cha (guardian) Zoua Cha (guardian) Mia Moua (mother) Pahoua Cha (minor) 	
<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			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			X
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input 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: KT	
			Reviewed on: 5/5/16	
			Updates:	
			Recommendation:	
			File 27- Cha	