



## 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.

Attorney Rindlisbacher, Curtis (for Lisa M. Lepper, Trustee of the Joseph 1994 Rev. Living Trust)

Attorney Ratzlaff, Ruth E. (for Beverly Perryman, Conservator of the Person and Estate)

Attorney Poochigian, Mark S. (for California Baptist Foundation)

**Probate Status Hearing Re: Termination of Proceeding for Deceased Conservatee**

<b>DOD: 6/17/2014</b>	<b>BEVERLY PERRYMAN</b> , niece, was appointed Conservator of the Person on 7/22/2003, and as Conservator of the Estate on 12/29/2008.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need current Status Report pursuant to Local Rule 7.5(B), and notice of the status hearing with a copy of the Status Report to be served on all parties.</li> <li>2. <i>Order Appointing Probate Conservator</i> filed 12/29/2008 containing Attachment 29 finds that upon execution of the <b>WILMA L. JOSEPH CHARITABLE REMAINDER TRUST</b> and the <b>SECOND AMENDMENT TO THE AMENDED AND RESTATED JOSEPH 1994 REVOCABLE LIVING TRUST</b>, the Conservatorship of the estate shall terminate. Need proof to be filed with the Court that the <b>WILMA L. JOSEPH CHARITABLE REMAINDER TRUST</b> and the <b>SECOND AMENDMENT TO THE AMENDED AND RESTATED JOSEPH 1994 REVOCABLE LIVING TRUST</b> were executed, and that the terms of said <i>Order</i> have been met such that the Conservator of the Person and Estate may be discharged via an <i>Ex Parte Petition for Final Discharge and Order</i>.</li> <li>3. Need proposed order for termination of the Conservatorship.</li> </ol>
<b>Cont. from</b>	<b>Notice of Status Hearing filed 6/10/2015</b> set this status hearing on 7/23/2015 for termination of proceedings for the deceased Conservatee. Clerk's Certification of Mailing shows notice was served to Beverly Perryman on 6/10/2015.	
<b>Aff.Sub.W</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	X	
<b>Aff.Mail</b>	X	
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/S</b>		
<b>Objectn</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>	X	
<b>Aff. Post</b>		
<b>Status Rpt</b>	X	
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notc</b>		
	<p><b>Order Approving Substituted Judgment to Create Charitable Remainder Trust and Amend Revocable Trust) Prob. C. 2580(a)</b> filed 12/29/2008 finds, in part:</p> <ul style="list-style-type: none"> <li>• <b>BEVERLY PERRYMAN</b> is appointed as Conservator of the Estate for the sole purpose of creating and executing the <b>WILMA L. JOSEPH CHARITABLE REMAINDER TRUST</b> approved by this Court order (to minimize income taxes), and to execute the <b>SECOND AMENDMENT TO THE AMENDED AND RESTATED JOSEPH 1994 REVOCABLE LIVING TRUST</b> approved by this court order;</li> <li>• Upon execution of the <b>WILMA L. JOSEPH CHARITABLE REMAINDER TRUST</b> and the <b>SECOND AMENDMENT TO THE AMENDED AND RESTATED JOSEPH 1994 REVOCABLE LIVING TRUST</b>, the Conservatorship of the estate shall terminate;</li> <li>• <b>LISA M. LEPPER</b> shall serve as Trustee of the <b>WILMA L. JOSEPH CHARITABLE REMAINDER TRUST</b> until the death of Wilma L. Joseph, and upon her death Lisa Lepper shall execute a resignation as Trustee, and the <b>CALIFORNIA BAPTIST FOUNDATION</b> shall then serve as the Successor Trustee of both of these trusts.</li> </ul>	
	<b>Reviewed by:</b> LEG	
	<b>Reviewed on:</b> 7/20/15	
	<b>Updates:</b>	
	<b>Recommendation:</b>	
	<b>File 1 – Joseph</b>	

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

<b>DOD: 2/6/2004</b>	<p><b>MARTIN WAYDE CHANEY</b> and <b>RHONDA ANN CHANEY MALEWSKI</b> were appointed co-administrators with full IAEA authority and without bond on 10/12/2004.</p> <p>Letters issued on 10/12/2004.</p> <p>Inventory and appraisal was due March 2005.</p> <p>First account or petition for final distribution was due October 2005.</p> <p>Creditor's Claims filed:                      U.S. Bank - \$1,778.52.</p> <p>Inventory and Appraisal filed on 1/20/15 showing an estate valued at \$423,000.00.</p> <p><b>Status Report of Martin Wade Chaney filed on 7/14/15 states</b> following the status hearing on 1/15/15, the co-administrators agreed to list the real property for sale. A listing agreement for sale of the real property is anticipated to be executed shortly.</p> <p>In the meantime, co-administrator Cheney's counsel has prepared a draft Petition for Settlement of First and Final Account and for Final Distribution for review by co-administrator Malewski and her attorney. Assuming the proposed petition is satisfactory to co-administrator Malewski and her counsel, co-administrator Cheney believes the estate is in a condition to be distributed and closed. If not, then it is estimated that an additional 3 months will be necessary to close the administration of the estate.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Inventory and Appraisal was only signed by Martin Wayde Chaney. Probate Code §8852 requires both personal representatives to sign the inventory and appraisal.</p>
<b>Cont. from 020714, 011515, 012515</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: KT</b>
		<b>Reviewed on: 1/13/15</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 2 – Chaney</b>

(1) Second and Final Account and Report of Conservator; (2) Petition for Allowance of Compensation to Conservator and Attorney; and (3) Distribution.

<b>DOD: 8/22/14</b>		<b>PUBLIC GUARDIAN</b> , Conservator, is Petitioner.  <b>Account period: 10/2/12 – 8/22/14</b> Accounting: \$130,406.97 Beginning POH: \$78,134.32 Ending POH: \$12,318.82  <b>Account period: 8/23/14 – 9/30/14</b> Accounting: \$14,208.26 Beginning POH: \$12,318.82 Ending POH: \$ 9,312.90 (\$7,903.37 cash plus personal property items)  Conservator: \$4,852.92 (for 36.04 Deputy hours @ \$96/hr and 18.33 Staff hours @ \$76/hr, itemized at Exhibit C)  Attorney: \$1,250.00 (Less than local rule)  Bond fee: \$50.00 (minimum – ok)  Costs: \$435.00  Petitioner states the Decedent's will is a pour-over will to her trust, so her assets consisting of \$1,315.45 plus personal property items should be distributed to the successor trustee, Kathleen Carlton. Copies of will and trust attached.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  Continued from 4/30/15, 6/11/15. As of 7/20/15, nothing further has been filed.  <b>Note:</b> Status Report filed 6/9/15 states the PG does not have an original copy of the will. Ms. Kruthers contacted Attorney Robyn Esraelian to request the original, who reported that she does not have the original. She is attempting to contact another family member to request the original. Therefore, PG needs a continuance to wait for the attorney to track down the will. The PG has requested an affidavit from the trustee and expects to have it before the continued date. Ms. Kruthers respectfully requests that this matter be continued for another six weeks. There is no harm to the estate for the delay because it is just two item of personal property that are secured.  <u>The following issues remain noted:</u>  1. Need Declaration pursuant to Probate Code §13100 from Kathleen Carlton, Successor Trustee of the Family Trust of Elmer M. Herman and Esther F. Herman.  2. Need Declaration re trust from Kathleen Carlton, Successor Trustee, pursuant to Local Rule 7.12.5.  3. Need original will pursuant to Probate Code §8200.	
Cont from 043015, 061115				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	2620			
<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: skc Reviewed on: 6/8/15 Updates: 6/9/15 Recommendation: File 4 - Herman		

<b>DOD: 2/20/11</b>	<p><b>PUBLIC ADMINISTRATOR</b> was appointed on the court's own motion as Successor Administrator on 7/31/13.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
	<p><b>JULIE FULCHER</b>, ex-wife, was appointed as Administrator with Full IAEA without bond on 8/23/11. Ms. Fulcher was removed and the Public Administrator appointed on 7/31/13.</p>	<p><b>OFF CALENDAR.</b> First and Final Account filed and set for hearing on 8/27/15.</p>
<p><b>Cont. from 102913, 052114, 112014, 032615</b></p>		
<b>Aff.Sub.Wit.</b>	<p>The intestate heirs are the Decedent's two children.</p>	
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<p><b>Reviewed by: KT</b></p>
		<p><b>Reviewed on: 7/20/15</b></p>
		<p><b>Updates:</b></p>
		<p><b>Recommendation:</b></p>
		<p><b>File 5 – Fulcher</b></p>

	<p><b>CATHERINE A. AMADOR</b>, Petitioner, is the attorney for Michele Torres and Nadine Walker since 10/23/14 in presenting objections regarding a prior petition for appointment of conservatorship of their mother by their brother, Stanley Greenberg, and in filing a competing petition.</p>	<p><b>NEEDS/PROBLEMS /COMMENTS:</b></p>
<p><b>Cont from 062515</b></p>		
<p><input type="checkbox"/> Aff.Sub.Wit.</p>		
<p><input checked="" type="checkbox"/> <b>Verified</b></p>	<p>The Public Guardian was appointed as Conservator of the Person and Estate on 12/10/14.</p>	
<p><input type="checkbox"/> <b>Inventory</b></p>		
<p><input type="checkbox"/> <b>PTC</b></p>	<p>Petitioner requests fees in connection with her representation of Ms. Torres and Ms. Walker and in reaching agreement on the matter.</p>	
<p><input type="checkbox"/> <b>Not.Cred.</b></p>		
<p><input checked="" type="checkbox"/> <b>Notice of Hrg</b></p>	<p>Petitioner asks that she be paid \$5,596.00, which includes \$5,125.00 for 20.50 attorney hours @ \$250/hr and costs of \$471.00.</p>	
<p><input checked="" type="checkbox"/> <b>Aff.Mail</b> <span style="float:right">w</span></p>		
<p><input type="checkbox"/> <b>Aff.Pub.</b></p>		
<p><input type="checkbox"/> <b>Sp.Ntc.</b></p>		
<p><input type="checkbox"/> <b>Pers.Serv.</b></p>	<p>Service are itemized by date and include appearance at hearings, working with Mr. Helon and Mr. Bagdasarian to resolve questions concerning the conservatorship estate and management of trust assets, etc.</p>	
<p><input type="checkbox"/> <b>Conf. Screen</b></p>		
<p><input type="checkbox"/> <b>Letters</b></p>		
<p><input type="checkbox"/> <b>Duties/Supp</b></p>		
<p><input checked="" type="checkbox"/> <b>Objections</b></p>	<p><b>An Objection was filed 6/24/15 by Stanley Greenberg, former temporary conservator.</b> Objector states that after four long mediations, the proper setting and care for the Conservatee was agreed upon pursuant to the agreement dated 10/16/13. This agreement also provided for Stanley Greenberg to be appointed permanent conservator of the person. Consequently, the only reason for the Objections filed by Ms. Amador and the legal fees incurred on behalf of Nadine Walker and Michele Torres was to pry into the finances of the trust under the guise of requesting to become conservators of the person and estate. In order to stop the endless lengthy communications, unfounded allegations, and unreasonable requests, Stanley Greenberg agreed to the appointment of the Public Guardian as Conservator of the Person and Estate. No wrongdoing was ever determined against Stanley P. Greenberg's handling of the assets or through his trust administration. Ms. Walker and Ms. Torres' petitions were simply a fishing expedition for information they were not entitled to receive, but was provided during mediations, and about which they simply would not stop making unreasonable requests. Probate Code §2640 allows a conservator of the estate to petition for compensation. Her client was not appointed as conservator, and the petition does not direct any specific party to pay said compensation. Objector refers to communication between the PG and Ms. Amador and requests that no compensation be approved to be paid by the estate of Conservatee for services rendered by Ms. Amador to Ms. Walker and Ms. Torres.</p>	
<p><input type="checkbox"/> <b>Video Receipt</b></p>		
<p><input type="checkbox"/> <b>CI Report</b></p>		
<p><input type="checkbox"/> <b>9202</b></p>		
<p><input checked="" type="checkbox"/> <b>Order</b></p>		
<p><input type="checkbox"/> <b>Aff. Posting</b></p>		<p><b>Reviewed by:</b> skc</p>
<p><input type="checkbox"/> <b>Status Rpt</b></p>		<p><b>Reviewed on:</b> 7/20/15</p>
<p><input type="checkbox"/> <b>UCCJEA</b></p>		<p><b>Updates:</b> 7/21/15</p>
<p><input type="checkbox"/> <b>Citation</b></p>		<p><b>Recommendation</b></p>
<p><input type="checkbox"/> <b>FTB Notice</b></p>		<p><b>File 7 - Greenberg</b></p>
	<p style="text-align:center"><b>SEE ADDITIONAL PAGES</b></p>	

**Page 2**

**Petitioner Catherine Amador filed Reply to Objection on 6/30/15.** Petitioner states he petition for fees and costs is authorized under §2640.1 and should be granted. Her clients' actions have allowed the Conservatee to remain in her daughter's home where she is happy and well cared-for, and ensured that she will continue to do so unless or until Ms. Walker is unable to properly care for her at home. Moreover, it is no longer necessary for Ms. Walker to beg Mr. Greenberg for adequate funds, and a sensible budget has been developed by the PG. Their actions have benefitted the Conservatee and there has also been a reduction of strife and conflict among the family.

Petitioner states she has now incurred an additional three hours reviewing the file and preparing this reply, plus attendance at a second hearing. Therefore, fees are now increased from \$5,125 to \$6,250. See Reply for additional description of details/history.

**Response filed 7/17/15 by Mr. Greenberg** responds to the various details provided in the Reply and requests that no compensation be approved to Petitioner for services rendered to Ms. Walker and Ms. Torres.

**Probate Status Hearing RE: Filing of the Inventory and Appraisal**

	<b>SHELIA STEARNS</b> was appointed Conservator of the Person and Estate with bond of \$50,000.00 and \$425,000.00 to be placed into blocked accounts pursuant to Evidentiary/Settlement Conference Minute Order dated 2-25-14. The Order was signed on 3-5-14.	<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <p><b><u>CONTINUED FROM 06/25/15</u></b></p> <p><b>Minute Order from 06/25/15 states: Counsel reports that his bonding agent requires a written order reducing bond; he will submit an order. Furthermore, he represents that the cash is inventoried, but he is still waiting on clarification of descriptions of mining interests in another county.</b></p> <p><b>Order Increasing Bond filed 06/26/15.</b></p> <ol style="list-style-type: none"> <li>1. Need Inventory &amp; Appraisal.</li> <li>2. Need Bond in the amount of \$373,717.86.</li> </ol>
<b>Cont. from 040215, 052815, 062515</b>	Ms. Stearns was formerly represented by Attorney Sheldon Feigel, who is no longer eligible to practice law. Mr. Rindlisbacher appeared for the conservator on 7-21-14.	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>	On 8-13-14, bond of \$50,000.00 was filed. Thereafter, Letters were issued on 8-25-14.	
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	At a Status Hearing on 01/29/15, the Court set this matter for a status hearing regarding filing of the Inventory & Appraisal.	
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: JF</b>
		<b>Reviewed on: 07/20/15</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 8 - Cook</b>

Cont. from 043015, 061115		<p><b>ANTON KREMER</b>, Trustee of the <b>GLORIA E. ZSIBA REVOCABLE TRUST AGREEMENT</b> dated 04/05/05 as Restated on 08/24/06 and Amended on 01/14/09, and intestate heir of GLORIA E. ZSIBA, filed a <b>Petition to Invalidate Trust Dated October 1, 2013 and any amendments on the Grounds of Undue Influence and Incapacity, etc.</b>, on 1/14/14.</p> <p>On <b>10/16/14</b>, the Court was advised by Lisa Horton (attorney for Anton Kremer) that an agreement was reached, and the Court set a status hearing re Acceptance of Terms and Conditions of the Proposed Agreement.</p> <p>Note: It does not appear that any petition for approval of settlement or signed settlement agreement was ever presented to the Court.</p> <p>On <b>3/19/15</b>, a Substitution of Attorney was filed that reflects that Anton Kremer is now self-represented.</p> <p>Mr. Kremer concurrently filed this <b>Notice of Motion and Motion for Order to Enforce Settlement Agreement, along with Memorandum of Points and Authorities</b>, requesting a judgment against Kevin L. Tracy requiring him to fulfill the terms of the Settlement Agreement.</p> <p>Attached to the motion is an <u>unsigned</u> settlement agreement, along with various photos and lists of personal property items.</p> <p style="text-align: center;"><b><u>SEE ADDITIONAL PAGES</u></b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Continued from 4/30/15, 6/11/15. On 7/20/15, Petitioner filed a supplemental declaration. The following issues remain:</p> <ol style="list-style-type: none"> <li>1. Petitioner cites CCP §664.6, which allows the Court to <u>enter judgment</u> on a stipulation for settlement, and to retain jurisdiction for enforcement.</li> </ol> <p>Here, the settlement agreement was never brought before the Court for judgment. Rather, the Court was informed of various terms of the settlement by status report of Petitioner's attorney only.</p> <p>Petitioner has now filed this motion to enforce the settlement, with an <u>unsigned</u> agreement attached.</p> <p>The Court may require authority to enforce settlement absent a signed settlement and Court judgment on the settlement itself, or any judgment on the original petition.</p> <p>Otherwise, it appears that the original petition is still outstanding.</p> <ol style="list-style-type: none"> <li>2. This motion was filed with a fee waiver. Given the circumstances and the apparent recovery of assets pursuant to this action, the \$60 filing fee for this motion may be due.</li> <li>3. If this motion goes forward, need Notice of Hearing (<u>mandatory</u> Judicial Council Form) and proof of service on all interested persons at least 30 days prior to the hearing pursuant to Probate Code §17203. (See list in original petition of persons entitled to notice of proceedings.)</li> </ol>
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg	x		
Aff.Mail	x		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
✓ Objections			
Video Receipt			
CI Report			
9202			
Order	x		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: skc			
Reviewed on: 7/20/15			
Updates: 7/21/15			
Recommendation:			
File 9 – Zsiba			

## Page 2

**Petitioner's Memorandum of Points and Authorities states** Kevin L. Tracy has failed to fulfill the terms of the 10/15/14 Settlement Agreement which represents a mutually agreed, legally binding, contract. Both parties agreed, on the record, in open court and signed a written agreement covering all issues involved in the pending litigation. Petitioner requests the Court enter a judgment to enforce the settlement agreement pursuant to Code of Civil Procedure § 664.6 which states that if parties stipulate in a writing signed outside the presence of the court or orally before the court for settlement of the case, or part thereof, the court, upon motion, may enter judgment pursuant to the terms of the settlement, and may retain jurisdiction to enforce the settlement. Additional authority also cited. Petitioner describes various personal property items at issue and asks the Court to enforce the settlement agreement.

**On 4/13/15, Kevin Lee Tracy filed Memorandum of Points and Authorities in Opposition to Petitioner's Motion to Enforce Settlement Agreement.** Objector states he has fulfilled his end of the settlement agreement. Petitioner alleges that the items were delivered in poor condition. Objector states items were delivered in the condition in which they were found, and made good faith effort to find all items listed and deliver same to Petitioner. See description of circumstances. Attached is an unsigned settlement agreement. Objector respectfully asks the court for dismissal of Petitioner's motion for enforcement.

<b>DOD: 09/16/13</b>	<p><b>CRAIG GAMMEL</b>, nephew, was appointed as Administrator with full IAEA and bond set at \$270,000.00 on 04/15/14. Bond was filed 02/07/14 and Letters were issued on 05/20/14.</p> <p>Inventory &amp; Appraisal, Final, filed 12/17/14 - \$418,244.00</p> <p>Inventory &amp; Appraisal, Corrected, filed 03/30/15 - \$465,561.00</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need First &amp; Final Account and Petition for Distribution and/or current verified status report.</p>
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<b>Reviewed by:</b> JF	
	<b>Reviewed on:</b> 07/21/15	
	<b>Updates:</b>	
	<b>Recommendation:</b>	
	<b>File 10 – Gammel</b>	

	<b>PUBLIC GUARDIAN</b> , was appointed Conservator of the Person and Estate on 02/26/14.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b><u>OFF CALENDAR</u></b> <b>First Account filed 07/16/15</b> <b>and set for hearing on 08/26/15</b>
	<b>Minute Order from 02/26/14</b> set this Status Hearing for filing of the First Account.	
Cont. from 050115, 062515	Inventory & Appraisal, Final, Corrected filed 06/10/15- \$386,187.26	
<input type="checkbox"/> Aff.Sub.Wit.		
<input type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	<b>Status Report Regarding Filing First Account</b> filed 04/13/15 states: Preparation of the first account has been delayed due to short staffing. A 60 day continuance is requested.	
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 07/20/15
		Updates:
		Recommendation:
		File 11 - Nishioka

12 Ronald M. Martinson (Estate)

Case No. 14CEPR00847

Atty Anderson, Gregory J (of Foothill Ranch, CA for Petitioner Debra Ann Winters)

Atty Hall, Christopher (for Contestant Christy Lynn Pedron)

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

DOD: 1/15/14		NEEDS/PROBLEMS/COMMENTS:  <b>OFF CALENDAR.</b> Request for Dismissal entered on 7/20/15.
Cont. from 102314, 042315		
<input type="checkbox"/>	Aff.Sub.Wit. S/P	
<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"/>	Aff.Mail W/	
<input checked="" 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 checked="" 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: KT
		Reviewed on: 7/20/15
		Updates:
		Recommendation:
		File 12A – Martinson

**Status Hearing Re: the Filing of the Inventory and Appraisal**

<b>DOD: 09/23/14</b>	<p><b>HEATHER AGUIRRE</b>, daughter, was appointed as Administrator with bond set at \$352,000.00 on 12/18/14. Letters were issued on 03/23/15.</p> <p><b>Minute Order</b> from hearing on 12/18/14 set this matter for a Status Hearing re Filing of the Inventory &amp; Appraisal on 04/23/14.</p> <p><b>Status Report re Filing of Inventory &amp; Appraisal filed 04/15/15</b> states: The Inventory &amp; Appraisal has not been prepared or filed because the decedent's conservatorship of the estate matter is still pending. The Conservator's Second and Final Account and Report of Conservator is scheduled for hearing on 05/11/15. It is anticipated that once the Second and Final Account is approved by the Court, the remaining funds in the Conservatorship Estate will be transferred to the Administrator to be inventoried. It is requested that a further status hearing be scheduled in approximately 90 days.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Inventory &amp; Appraisal filed 07/16/15 is missing attachment 1. Need Inventory &amp; Appraisal with Attachment 1.</p>
<b>Cont. from 042315</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 07/20/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 13 - MacMurray</b></p>

**Probate Status Hearing RE: Receipt for Blocked Account**

<b>Age: 5</b>	<p><b>DILILA AGANZA</b>, mother, was appointed Guardian of the Estate on 04/23/15 with bond set at \$100,980.00.</p> <p><b>Declaration of Dilila Aganza Regarding Bond and Amount of Estate</b> filed 07/07/15 states that the amount to be distributed to Francisco is less than initially thought and is actually \$9,287.55.</p> <p><b>Minute Order from 07/09/15 status hearing regarding filing of the bond</b> states: The Court vacates any previous order with regard to bond and orders that the funds be placed into a blocked account, the amount being \$9,287.55. Mr. Thelan may submit an ex parte blocking order, and if the receipt is filed then no appearance is necessary on 07/23/15.</p> <p><b>Declaration of Dilila Aganza Regarding Bond &amp; Amount of Estate</b> filed 07/21/15 states: The institution where the funds will be deposited into a blocked account is Fresno County Federal Credit Union on Cedar Ave. in Fresno. The amount available for distribution has increased since the last hearing to \$11,736.37.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> No Order Appointing Guardian has been signed and/or filed.</p> <ol style="list-style-type: none"> <li>1. Need Order Appointing Guardian of Minor. <b>Note:</b> Order should reflect that funds are to be deposited into a blocked account.</li> <li>2. Need Order to Deposit Money into Blocked Account (form MC-355).</li> </ol>
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>	x	
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 07/21/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 15 – Gonzalez</b>

Petition for Probate of Will and for Letters Testamentary

DOD: 12/25/13		<p><b>SHANNON SCOGGINS</b>, named alternate executor, without bond, is petitioner.</p> <p>Named executor Robert Jennings is deceased.</p> <p>Full IAEA – o.k.</p> <p>Will dated: 4/16/04</p> <p>Residence: Fresno          Publication: Fresno Business Journal</p> <p><b>Estimated value of the Estate:</b>          Real property - \$500,000.00</p> <p><b>Probate Referee: Steven Diebert</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> <li>• <b>Wednesday, January 13, 2016</b> at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.</li> <li>• <b>Wednesday, September 21, 2016</b> at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
Cont. from 061815			
<input type="checkbox"/>	Aff.Sub.Wit. S/P		
<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"/>	Aff.Mail W/		
<input checked="" 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		
<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: 7/20/15	
		Updates:	
		Recommendation: SUBMITTED	
		File 17 - Jennings	

Attorney Rowland, Woodford G. (of San Rafael, CA, for Petitioners)

Attorney Forbes, Donald R. (for Respondent)

Petition to Invalidate Trust Restatement for Lack of Capacity; Undue Influence, Elder Abuse

<b>DOD: 12/9/14</b>	<b>WALTER LEACH, III and ALFRED W. LEACH,</b> beneficiaries, are Petitioners.	<p style="text-align: center;"><b><u>NEEDS/PROBLEMS/COMMENTS:</u></b></p> <p style="text-align: center;"><b><u>SEE PAGE 3</u></b></p> <p><b>Note: On 7/21/15, Petitioners filed Application of Robert P. Avolio, Esq. for Admission Pro Hac Vice, which is set for hearing 8/31/15 at 9:00 am in Dept. 303.</b></p>
	<b>Petitioners state</b> the settlor, a resident of Novato, Marin County, CA, died there at age 99 on 12/9/14. She had no children, and her heirs at law are the four surviving children of her brother Wlater, who is deceased, namely Walter Leach III, Alfred W. Leach, Susan Leach Hansen, and Walter W. Leach.	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	On or about 1/31/14, the settlor established the trust (Exhibit A). Settlor subsequently executed a Restatement on 3/17/14.	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	w	
<input type="checkbox"/> <b>Aff.Pub.</b>	Settlor and <b>Respondent SUSAN LEACH HANSEN</b> , a resident of Fresno, CA, were co-trustees according to the restatement.	
<input type="checkbox"/> <b>Sp.Ntc.</b>	Respondent is currently serving as successor trustee.	
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>	Petitioners state that under the terms of the settlor's previous estate-planning documents, as well as the laws of intestacy, each of the petitioners was a one-quarter beneficiary of the settlor's estate. Under the terms of the original trust, the settlor left 100% of her estate to Respondent. Under the terms of the restatement, the settlor left 80% of her estate to Respondent, with minimal shares to others.	
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input type="checkbox"/> <b>Order</b>	x	
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>	Petitioners state until approx. two years before her death, each of the petitioners had enjoyed a loving and constant relationship with the settlor, including correspondence, vacations when they were younger, mutual gifts on birthdays and holidays, and frequent telephone contact. Immediately before her death, the settlor again stated her love for both petitioners and her feeling of embarrassment and anger that she had been manipulated by Respondent.	
	<b><u>SEE ADDITIONAL PAGES</u></b>	
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 7/21/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 18 – Leach</b>

Petitioners state Settlor spoke of her lack of respect for Respondent, her disappointment with Respondent's failed marriages, her obvious attempts to integrate herself into the settlor's estate, her misuse of her own finances and bankruptcy filing, frequent unemployment and lack of accomplishments. On more than one occasion she commented that she was aware Respondent wanted a significant inheritance from her, but did not want to "reward failure" by leaving anything to her. About two years before her death, an abrupt change occurred in the Settlor's attitude towards Petitioners for no apparent reason. Petitioners believe the settlor was manipulated by Respondent.

**First Cause of Action:** Invalidity of Trust and Restatement for Lack of Capacity  
**Second Cause of Action:** Invalidity of Trust and Restatement for Undue Influence  
**Third Cause of Action:** Elder Financial Abuse  
**Fourth Cause of Action:** Constructive Trust  
See petition for description of each cause of action.

**Petitioners request judgment as follows:**

1. Invalidating the Trust and Restatement of Trust on the grounds that the Settlor lacked testamentary capacity when she executed the Trust and Restatement;
2. Invalidating the Trust and Restatement of Trust on the grounds that Respondent procured the Trust and Restatement by undue influence;
3. For compensatory damages pursuant to the Welfare and Institutions Code § 15657.5(a), awarded based on Petitioners' elder financial abuse claim as defined by Welfare and Institutions Code §15610.30, in a sum to be determined by the Court, plus interest and other damages as defined by the Court;
4. For the issuance of a writ of attachment against Respondent pursuant to Welfare and Institutions Code §15657.01 for the collection of damages in an amount to be determined by the Court;
5. For punitive damages pursuant to W&I Code §15657.5 and Civil Code §3294;
6. For reasonable attorney's fees pursuant to W&I Code §15657.5(a), in an amount to be determined by the Court;
7. For double damages under Probate Code §859;
8. For an order declaring that Respondent holds certain assets including real and personal property or proceeds or distributions therefrom;
9. For Petitioners' costs of suit herein, including reasonable attorney's fees; and
10. For any other relief that the Court considers just and proper.

**Objection filed 6/18/15 by Respondent SUSAN LEACH HANSEN** responds to the various causes of actions (denies, lacks sufficient evidence, admits/denies, etc.) and prays that the petition be denied, that Petitioners take nothing by reason thereof; that Petitioners be denied any interest in the trusts per the terms of the trust as if each of them had predeceased Marian E. Leach; that Respondent be awarded her costs, including attorneys' fees and/or penalties reciprocal with the claim made by Petitioners, and for such other and further relief as the Court deems just and reasonable.

**On 6/18/15, the parties filed a Stipulation for Court Ordered Blocked Account and requested an ex parte order thereon.** Order on Stipulation for Blocked Account was filed 6/19/15, and subsequently, a Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked Account was filed reflecting \$783,126.23 on deposit with Wells Fargo Bank, N.A., titled Susan Leach Hansen, Trustee of the Marian E. Leach Trust, 2014.

**SEE ADDITIONAL PAGES**

**NEEDS/PROBLEMS/COMMENTS:**

1. Local Rule 7.1.1.C requires that the Probate Code section that allows the requested relief appear below the title of the pleading.

Petitioner does not provide authority for filing this petition in the Probate Court. Rather, the prayer refers to the Welfare and Institutions and Civil Codes, with additional damages under the Probate Code reliant on the other findings.

It appears that most of the relief sought in this petition would be more appropriately litigated in the Civil Court.

A subsequent probate trust filing may be appropriate once the other matters are litigated; however, damages under the Probate Code appear premature. Further, the prayer for double damages under Probate Code §859 does not appear appropriate here since the relief and damages are requested under the W&I and Civil Codes.

**If this petition goes forward in the Probate Court:**

2. Respondent Susan Leach Hansen was served "C/O" her attorney only. Direct notice is required by Probate Code §1214 and Cal. Rule of Court 7.51.
3. An additional attorney was served: Daryl Weinroth of Novato, CA. The Court may require clarification as to which party Mr. Weinroth represents.
4. Need Order. See Local Rules 7.1.1.F and 7.6.1.

Reconsideration Hearing Re: Medical Consent Powers

	<b>PUBLIC GUARDIAN</b> was appointed Conservator of the person and estate on 7/2/15.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need Capacity Declaration supporting medical consent powers.</li> <li>2. If Capacity Declaration supporting medical consent powers is filed will need Amended Orders and Letters.</li> </ol>
	Letters issued on 7/21/15.	
<b>Cont. from</b>	<p>The Petition for Appointment of Conservator included a request for medical consent powers. A Capacity Declaration was not filed.</p> <p><b>Minute Order dated 7/2/15</b> states the Court grants the petition without medical consent powers at this time due to lack of a Capacity Declaration. This reconsideration hearing was set to reconsider the request for medical consent powers.</p>	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: KT</b>
		<b>Reviewed on: 7/21/15</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 19 – Cotton</b>

Petition for Letters of Administration; Authorization to Administer Under the Independent Administration of Estates Act

DOD: 6/12/2007		<p><b>ABDOWALI MOHAMED</b>, son, is petitioner and requests appointment as Administrator without bond.</p> <p>All heirs waive bond.</p> <p>Full IAEA – o.k.</p> <p>Decedent died intestate.</p> <p>Residence: Fresno Publication: Fresno Business Journal</p> <p><b>Estimated value of the estate:</b> Real property - \$200,000.00</p> <p><b>Probate Referee: Steven Diebert.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Minute order dated 7/9/15 states if the necessary waivers are filed, the Court is prepared to grant the petition so that the 7/23/15 hearing can come off calendar. As of 7/20/15 the following issue remains.</p> <p>1. Waivers on bond must be on the mandatory Judicial Council form. (Form no. DE-142)</p> <p><b>Note:</b> If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> <li><b>Wednesday, January 20, 2016</b> at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.</li> <li><b>Wednesday, September 14, 2016</b> at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>	
Cont. from 070915				
<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"/>	Aff.Mail			W/
<input checked="" 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			
<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: 7/20/15		
		Updates:		
		Recommendation:		
		File 23 – Mohamed		

Petition for Probate of Will and for Letters Testamentary with IAEA

DOD: 4/26/11		<p><b>CAROLYN M. FURHMANN</b>, named executor without bond, is petitioner.</p> <p>Full IAEA – not published for</p> <p>Will dated: 8/8/08</p> <p>Residence: Prather Publication: Mountain Press</p> <p><b>Estimated value of the estate:</b>                  Personal property - \$ 90,500.00                  Real property - \$ 60,000.00  <b>Total - \$150,500.00</b></p> <p><b>Probate Referee: Rick Smith</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>Petition requests full IAEA authority. Notice of Petition to Administer the Estate did not include the request for IAEA authority. Probate Code §10451 states if the authority to administer the estate under IAEA is requested in the petition, notice of the hearing on the petition shall be given for the period and in the manner applicable to the petition for appointment and shall include the request to administer under IAEA.</li> <li>Publication did not include the request to administer the estate under IAEA. Probate Code §8121.</li> </ol> <p><b>Note:</b> If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> <li><b>Wednesday, January 13, 2016</b> at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.</li> <li><b>Wednesday, September 21, 2016</b> at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>	
Cont. from				
<input checked="" type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
	Inventory			
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	Pers.Serv.			
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<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			
	UCCJEA			
	Citation			
	FTB Notice			
		<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 7/21/15</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 24 – Zindars</b></p>		

Petition to Appoint Conservator of the Person

	THERE IS NO TEMPORARY. No temporary was requested.		<b>NEEDS/PROBLEMS/COMMENTS:</b>  Court Investigator advised rights on 7/10/15.  Voting Rights affected need minute order.
	JULIE D. RIVERA, mother, is petitioner.		
	Please see petition for details.		
	Court Investigator Report filed on 7/16/15.		
	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		
			Reviewed by: KT
			Reviewed on: 7/21/15
			Updates:
			Recommendation:
			File 26 – Rivera

**27 Nolan Boudreau (GUARD/P) Case No. 15CEPR00669**

Petitioner Estis, Deborah (Pro Per- Maternal Grandmother)

Petition for Appointment of Temporary Guardianship of the Person

Age: 3 months	<b>GENERAL HEARING 09/09/2015</b>		<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Temporary Guardian or consent and waiver of notice or declaration of due diligence for:</p> <ul style="list-style-type: none"> <li>Felix Cheng (Father)</li> </ul>
	<p><b>DEBORAH ESTIS</b>, maternal grandmother, is petitioner.</p> <p style="text-align: center;"><u>Please see petition for details</u></p>		
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	w/		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.		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			
			<b>Reviewed by:</b> LV
			<b>Reviewed on:</b> 07/21/2015
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 27 – Boudreau</b>

Petitioner: Mark Thompson (pro per – father)  
 Petitioner: Janessa Thompson (pro per – mother)

Petition to Establish Fact, Time & Place of Birth

		<p><b>MARK THOMPSON</b>, father, and <b>JANESSA THOMPSON</b>, mother, are petitioners.</p> <p>Please see petition for details.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
Cont. from			
<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 type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input 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: 7/21/15	
		Updates:	
		Recommendation:	
		File 28 – Thompson	

**29 Titus Thompson (F/BIRTH)**

**Case no. 15CEPR00672**

Petitioner: Mark Thompson (pro per – father)

Petitioner: Janessa Thompson (pro per – mother)

**Petition to Establish Fact, Time & Place of Birth**

		<p><b>MARK THOMPSON</b>, father, and <b>JANESSA THOMPSON</b>, mother, are petitioners.</p> <p>See Petition for details.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
Cont. from			
<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 type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input 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: 7/21/15	
		Updates:	
		Recommendation:	
		File 29 - Thompson	

**30 Tabitha Thompson (F/BIRTH)**

**Case no. 15CEPR00674**

Petitioner: Mark Thompson (pro per – father)

Petitioner: Janessa Thompson (pro per – mother)

**Petition to Establish Fact, Time & Place of Birth**

		<p><b>MARK THOMPSON</b>, father, and <b>JANESSA THOMPSON</b>, mother, are petitioners.</p> <p>Please see petition for details.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
Cont. from			
<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 type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input 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: 7/21/15	
		Updates:	
		Recommendation:	
		File 30 – Thompson	

Petitioner: Mark Thompson (pro per – father)  
 Petitioner: Janessa Thompson (pro per – mother)

**Petition to Establish Fact, Time & Place of Birth**

		<p><b>MARK THOMPSON</b>, father, and <b>JANESSA THOMPSON</b>, mother, are petitioners.</p> <p>Please see petition for details.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
Cont. from			
<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 type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input 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: 7/21/15
			Updates:
			Recommendation:
			File 31- Thompson

Petitioner: Mark Thompson (pro per – father)

Petitioner: Janessa Thompson (pro per – mother)

Petition to Establish Fact, Time & Place of Birth

		<p><b>MARK THOMPSON</b>, father, and <b>JANESSA THOMPSON</b>, mother, are petitioners.</p> <p>Please see petition for details.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
Cont. from			
<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 type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input 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: 7/21/15	
		Updates:	
		Recommendation:	
		File 32- Thompson	

**33 Mordecai Thompson (F/BIRTH)**

**Case no. 15CEPR00677**

Petitioner: Mark Thompson (pro per – father)

Petitioner: Janessa Thompson (pro per – mother)

**Petition to Establish Fact, Time & Place of Birth**

		<p><b>MARK THOMPSON</b>, father, and <b>JANESSA THOMPSON</b>, mother, are petitioners.</p> <p>Please see petition for details.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
Cont. from			
<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 type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input 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: 7/21/15	
		Updates:	
		Recommendation:	
		File 33 – Thompson	