



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Second and Final Account and Report of Conservator; Petition for Allowance of Compensation to Conservator and Attorney

DOD: 8/7/15	PUBLIC GUARDIAN , Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 4/21/10 – 8/7/15	
Cont. from	Accounting - \$73,644.84	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$ 1,102.41	
<input checked="" type="checkbox"/> Verified	Ending POH - \$ 1,338.14	
Inventory		
PTC	Subsequent Account period: 8/8/15 – 7/18/16	
Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Accounting - \$1,339.46	
<input checked="" type="checkbox"/> Aff.Mail W/	Beginning POH - \$1,338.14	
	Ending POH - \$1,219.46	
Aff.Pub.	Conservator - \$2,655.28	
Sp.Ntc.	(16.18 Deputy hours @ \$96/hr and 14.5 Staff hours @ \$76/hr)	
Pers.Serv.		
Conf. Screen		
Letters	Attorney - \$1,250.00	
Duties/Supp	(per Local Rule)	
Objections	Petitioner request that due to the insufficiency of the estate to pay the fees and commissions that a lien be imposed upon the estate for any unpaid balances of the authorized fees and commissions.	
Video Receipt		
CI Report		
9202		
<input checked="" type="checkbox"/> Order	Petitioner prays for an Order:	
Aff. Posting	1. Approving, allowing and settling the second account;	
Status Rpt	2. Authorizing the conservator and attorney fees and commissions;	
UCCJEA	3. Authorize petitioner to impose a lien on the estate for any unpaid balances of authorized fees and commissions.	
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 9/29/16
		Updates:
		Recommendation:
		File 1- Tate

Petitioner Nena Soledad Saiz (Pro Per, maternal aunt)

Petition for Appointment of Guardian of the Person

		NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
		NENA SOLEDAD SAIZ , maternal aunt, is Petitioner.	
		<i>~Please see Petition for details~</i>	Continued from 8/20/2016. Minute Order states question #8 from the screening form was answered in open court. The Court Investigator is to provide CII to the Court. Examiner Notes given.
Cont. from 082916		Court Investigator's Report filed 8/23/2016.	
<input type="checkbox"/>	Aff.Sub.Wit.		The following defects from the last hearing remain: 1. Need Notice of Hearing and proof of personal service of the Notice of Hearing with a copy of the Petition for Appointment of Guardian, or Consent to Appointment of Guardian and Waiver of Notice, or a Declaration of Due Diligence, for: <ul style="list-style-type: none"> • Ursula Reyes, mother; • Jerry Rodriguez, father. <i>~Please see additional page~</i>
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	X	
<input type="checkbox"/>	Aff.Mail	X	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	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 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		
			Reviewed by: LEG
			Reviewed on: 9/26/16
			Updates:
			Recommendation:
			File 2- Rodriguez

2 Additional Page, King Raul Rodriguez (GUARD/P) Case No. 09CEPR00409

NEEDS/PROBLEMS/COMMENTS, continued:

2. Need proof of service by mail of the *Notice of Hearing* with a copy of the *Petition for Appointment of Guardian*, or *Consent to Appointment of Guardian and Waiver of Notice*, or a *Declaration of Due Diligence*, for:
 - paternal grandparents;
 - Alex Reyes, maternal grandfather;
 - Patricia Ann Garcia, maternal grandmother;
 - Maddox Reyes, sibling, if age 12 or over.

3 Mychael John Salvador (GUARD/P)

Case No. 09CEPR00862

Petitioner Salvador, Krystal (Pro Per – Mother)

Petition for Visitation

Age: 9 years	KRYSTAL SALVADOR, mother, is Petitioner.		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 09/12/2016: The matter is continued due to the late filed Notice of Hearing as to father. The Court reserves the right to not consider late-filled documents in the future.</p> <p>Minute Order of 08/01/2016: Alicia Bradshaw, Guardian, represents she received a copy of the petition approximately 30 days ago. The Court orders that any response is to be filed and properly served by 08/29/2016. Petitioner must properly notice Mark Thompson, Jr., father.</p>
	<u>Please see petition for details</u>		
Cont. from 080116, 091216			
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	w/		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input type="checkbox"/> Order	x		
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed by: LV
			Reviewed on: 09/27/2016
			Updates:
			Recommendation:
			File 3- Salvador

Status RE: Settlement

	<p>GERALD ISHII, Beneficiary and Co-Trustee, filed Petition of Beneficiary to Remove Successor Co-Trustees, Appoint Temporary Successor Trustee, and for Payment of Attorneys' Fees and Costs on 5/17/12. The petition was set for hearing on 7/2/12.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 5/23/16: Counsel represent that they are still working on the settlement and making progress, request 90 days.</p>
<p>Cont. from 012516, 052316, 082916</p>	<p>LESLIE ISHII, Beneficiary and Co-Trustee, filed Objection on 6/21/12.</p>	
<p>Aff.Sub.Wit.</p>	<p>The hearing on 7/2/12 was continued numerous times, and after numerous status and settlement hearings, at the settlement conference hearing on 1/5/15, the parties represented that they are working on agreement, and the Court set this status hearing re the agreement for 4/13/15.</p>	
<p>Verified</p>	<p>The status hearing re the agreement was then continued to 4/13/15, 7/13/15, and finally 10/19/15. On 10/19/15, the Court set an Order to Show Cause hearing for 11/30/15 as to Gerald Ishii as to why he should not be removed as co-trustee for failure to resolve the matter and to Edward L. Fanucchi as to why he should not be sanctioned for his failure to appear.</p>	
<p>Inventory</p>	<p>Status Report filed 8/26/16 by Attorney Burnside states the matter was tentatively resolved in 2014, but there were several deal-points that needed to be worked out, requiring input from the parties' accountants. Last year, Gerald Ishii proposed that the agreement include a lot-line adjustment involving separate adjacent parcels owned by him and by Les Ishii. Those parcels are not part of the trust or the underlying dipute. Les Ishii nevertheless agreed to the adjustment to give additional acreage to Gerald Ishii, but there remained details concerning the location of the new line. Those details have been resolved, but Les Ishii asked for access rights to maintain certain agricultural equipment located near the new lot line. Gerald agreed.</p>	
<p>PTC</p>	<p>A written settlement was circulated, and a further draft was sent on 8/9/16. Ms. Burnside is presently waiting for counsel as to whether it is acceptable to Gerald Ishii.</p>	
<p>Not.Cred.</p>	<p>Status Report filed 8/26/16 by Attorney Fanucchi states the settlement agreement should be filed within the next 30 days.</p>	
<p>Notice of Hrg</p>		
<p>Aff.Mail</p>		
<p>Aff.Pub.</p>		
<p>Sp.Ntc.</p>		
<p>Pers.Serv.</p>		
<p>Conf. Screen</p>		
<p>Letters</p>		
<p>Duties/Supp</p>		
<p>Objections</p>		
<p>Video Receipt</p>		
<p>CI Report</p>		
<p>9202</p>		
<p>Order</p>		
<p>Aff. Posting</p>		
<p>Status Rpt</p>		
<p>UCCJEA</p>		
<p>Citation</p>		
<p>FTB Notice</p>		
<p>Reviewed by: skc</p>		
<p>Reviewed on: 9/26/16</p>		
<p>Updates:</p>		
<p>Recommendation:</p>		
<p>File 5- Ishii</p>		

6 Jacare Andrew Shepheard, Jr., Zachary Tucker, III (GUARD/P)
Case No. 12CEPR00512

Petitioner: Lontoila Gary (pro per)

Petition for Appointment of Guardian of the Person

		<p>THERE IS NO TEMPORARY. No temporary was requested.</p> <p>LONTOILA GARY, non-relative, is petitioner.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>This petition is as to ZACHARY TUCKER III only. Guardianship of Jaycare Shepheard was granted to Johnyca Royster on 8/7/12.</p> <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. Zachary Tucker III (father) b. Denell Brandon (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. Zachary Tucker II (paternal grandfather) b. Angelica Palmer (paternal grandmother) c. Will Brandon (maternal grandfather) d. Debra Camicle (maternal grandmother) 																																																																			
<p>Cont. from</p> <table border="1"> <tr><td><input type="checkbox"/></td><td>Aff.Sub.Wit.</td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Verified</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Inventory</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>PTC</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Not.Cred.</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Notice of Hrg</td><td><input checked="" type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td>Aff.Mail</td><td><input checked="" type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td>Aff.Pub.</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Sp.Ntc.</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Pers.Serv.</td><td><input checked="" type="checkbox"/></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Conf. Screen</td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Letters</td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Duties/Supp</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Objections</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Video Receipt</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>CI Report</td><td><input checked="" type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td>9202</td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Order</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Aff. Posting</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Status Rpt</td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>UCCJEA</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Citation</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>FTB Notice</td><td></td></tr> </table>				<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 type="checkbox"/>	CI Report	<input checked="" type="checkbox"/>	<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"/>
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		<p>Reviewed by: KT</p> <p>Reviewed on: 9/26/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 6- Shepheard & Tucker</p>																																																																				

Attorney Heather H. Kruthers (for Petitioner Public Administrator)

First Amended First and Final Account and Report of Administrator and Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and for Distribution

DOD: 7/13/2014	PUBLIC ADMINISTRATOR , Administrator with Will Annexed, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 8/22/2014 – 2/18/2016	
	Accounting - \$510,335.49	
Cont. from 062316	Beginning POH - \$495,712.14	
Aff.Sub.Wit.	Ending POH - \$370,973.15 <i>(all cash)</i>	
✓ Verified		
✓ Inventory	Administrator - \$12,497.28 <i>(statutory)</i>	
✓ PTC		
✓ Not.Cred.	Administrator X/O - \$2,100.85 <i>(\$1,000.00 for sale of real property per Local Rule; \$852.85 for sale of personal property @ 10% of gross value; \$248.00 for preparation of tax returns @ 1 deputy hour @ \$96/hour and 2 clerk hours @ \$76/hour;)</i>	
✓ Notice of Hrg		
✓ Aff.Mail	<i>W/</i>	
Aff.Pub.	Attorney - \$12,497.28 <i>(statutory)</i>	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Costs - \$997.50 <i>(filing fees, certified copies)</i>	
Letters 011415		
Duties/Supp	Closing - \$2,000.00	
Objections	Bond Fee - \$1,913.76 <i>(ok)</i>	
Video Receipt		
CI Report	Distribution pursuant to Decedent's Will is to:	
✓ 9202	• ARMENIAN GENERAL BENEVOLENT UNION , Fresno – \$169,483.24 cash;	
✓ Order		
Aff. Posting Status Rpt	• ARMENIAN GENERAL BENEVOLENT UNION , New York – \$169,483.24 cash.	
UCCJEA		
Citation		
✓ FTB Notice		
		Reviewed by: LEG
		Reviewed on: 9/26/16
		Updates:
		Recommendation:
		File 7 - Paregian

Second Amended Report and Final Account

DOD: 4/14/16	CATHERINE MARY KELLEY , Daughter and Conservator of the Person and Estate with bond of \$111,624.00, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need proof of service of Notice of Hearing on Nona Shannon, or waiver thereof. 2. Need original will deposited with the Court per Probate Code §8200. <u>Note:</u> The proposed order has been interlineated to reflect that Petitioner will be discharged as Conservator upon the filing of receipt signed by the distribute Nona Shannon and Ex Parte Petition for Final Discharge and Order (Mandatory Judicial Council Form GC-395). <hr/> Reviewed by: skc <hr/> Reviewed on: 9/27/16 <hr/> Updates: <hr/> Recommendation: File 8- Shannon
	Account period: 1/15/15 – 1/29/15 Accounting: \$84,147.04 Beginning POH: \$81,347.05 Ending POH: \$80,622.99	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory	Account period: 1/30-15 – 4-14-16 Accounting: \$118,878.19 Beginning POH: \$80,622.99 Ending POH: \$67,335.04	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail	Account period: 4/15/16 – 8/6/16 Accounting: \$67,335.04 Beginning POH: \$67,335.04 Ending POH: \$ 7,678.71 (\$1,604.99 cash plus personal property valued at \$6,073.72)	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters	Conservator and Attorney both waive compensation. Petitioner states the decedent died testate, survived by his wife Nona Shannon, among others. Nona is entitled to all remaining cash and personal property and has executed an affidavit pursuant to §13100. Petitioner took possession of the vehicle to which Nona is entitled, and requests confirmation of Nona's possession of said vehicle. The decedent's home was sold pursuant to Order Confirming Sale 4/11/16. Upon payment of the encumbrances, the conservatorship estate received no money from the sale.	
<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	Petitioner requests an order that: 1. This account and report be approved and settled; 2. The acts of the conservator shown in the account and report be approved; 3. That the change in title to the conservatee's automobile be approved and confirmed to Nona Shannon; 4. That the remaining balance in the account of \$1,714.35 be distributed to Conservatee's wife, Ms. Nona Shannon, as there are no other assets or charges against the estate; 5. That possession of the Conservatee's furniture and furnishings in the possession of the Conservatee's wife and in storage be approved and confirmed to Ms. Shannon; 6. That the Conservator be discharged as conservator of the person and estate; and 7. For such other and further orders as the Court may deem proper.	
<input type="checkbox"/> FTB Notice		

First and Final Report of the Personal Representative and Petition for Final Distribution on Waiver of Accounting and Waiver of Allowance of Statutory Commissions

DOD: 10/12/07	DARLENE TOMIKO KAWANO, Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. There is no provision in the Probate Code for court ordered payments to the document preparer. Payments to the document preparer must be outside of the probate proceedings. 2. Order does not comply with Local Rule 7.6.1C. Monetary distributions must be stated in dollars and not a percentage of the estate.
	Accounting is waived.	
Cont. from	I & A - \$335,000.00	
<input type="checkbox"/> Aff.Sub.Wit.	POH - \$347,658.98	
<input checked="" type="checkbox"/> Verified	Administrator - waives	
<input checked="" type="checkbox"/> Inventory	Document preparer - \$1,984.39 (representing 1/3 of statutory)	
<input checked="" type="checkbox"/> PTC	Closing reserve - \$3,000.00	
<input checked="" type="checkbox"/> Not.Cred.	Distribution pursuant to intestate succession is to:	
<input checked="" type="checkbox"/> Notice of Hrg	Darlene Kawano - 1/4	
<input checked="" type="checkbox"/> Aff.Mail W/	Marvin Kawano - 1/4	
<input type="checkbox"/> Aff.Pub.	David Kawano - 1/4	
<input type="checkbox"/> Sp.Ntc.	Inez Kawano - 1/4	
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters 6/8/15		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input checked="" type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 9/26/16
		Updates:
		Recommendation:
		File 9- Kawano

Petitioner Craig Joseph Brandon (Pro Per)

Petition for Final Distribution on Waiver of Accounting, for Reimbursement to Executor and Allowance of Administrator's Commissions

DOD: 4/1/2015	CRAIG JOSEPH BRANDON , son and Executor, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i> and proof of service of notice to the following persons pursuant to Probate Code §1220(a)(1) and pursuant to § 11000 for settlement of the account: <ul style="list-style-type: none"> • Chris Brandon, son. 2. <i>Final Inventory and Appraisal</i> filed 12/25/2015 indicates that Steven Diebert appraised the property and collected the fee to which the referee is entitled, rather than Rick Smith, who is the designated Probate Referee for this matter pursuant to Probate Code § 8902 and the <i>Order for Probate</i> filed 7/1/2015. Court may require notice to Rick Smith under Probate Code § 8903(c)(5). 3. Paragraph 4 of the Petition states a <i>Supplemental Inventory and Appraisal</i> was filed showing a value of \$2,500.00. However, Court records do not show a supplemental inventory and appraisal was filed. Need supplemental inventory and appraisal to be filed with the Court. <p align="center">~Please see additional page~</p> 	
	Accounting is waived.		
Cont. from	I & A — \$152,261.50?		
<input type="checkbox"/> Aff.Sub.Wit.	POH — \$147,996.46 <i>(all cash)</i>		
<input checked="" type="checkbox"/> Verified			
<input checked="" type="checkbox"/> Inventory	Executor — \$4,916.00 <i>(less than statutory?)</i>		
<input checked="" type="checkbox"/> PTC			
<input checked="" type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg	Executor Costs — \$4,777.17? <i>(filing fees probate referee; publication; certified copies; real property expenses including utilities, insurance; wheelchair rental for Decedent; funeral expenses;)</i>		
<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	Distribution pursuant to Decedent's Will is to:		
<input type="checkbox"/> Letters 070215	<ul style="list-style-type: none"> • CRAIG JOSEPH BRANDON – [\$66,912.88?] cash; • CHRIS VIRGIL BRANDON – [\$66,912.88?] cash. 		
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input checked="" type="checkbox"/> 9202			
<input type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input checked="" type="checkbox"/> FTB Notice			
			Reviewed by: LEG
			Reviewed on: 9/26/16
		Updates:	
		Recommendation:	
		File 10- Brandon	

10 Additional Page, Virgil Joseph Brandon (Estate) Case No. 15CEPR00527

NEEDS/PROBLEMS/COMMENTS, continued:

4. Statutory fee calculation in paragraph 19 of the *Petition* cannot be verified as correct due to the lack of Petitioner having filed a supplemental inventory and appraisal of property valued at **\$2,500.00**, as stated in the *Petition*.
5. *Exhibit A, Expenses of Administrator* includes the following request for reimbursement totaling **\$735.24** for costs that are not allowed per Local Rule 7.17(B), or are allowed only in the Court's discretion:
 - 4/7/2015 payment of **\$54.24** for probate book;
 - 5/17/2015 payment of **\$675.00** for paralegal assistance fees;
 - 7/1/2015 payment of **\$6.00** for parking.
6. Proposed distribution purports to deduct the sum of **\$4,473.53** for additional expenses from the share of **CHRIS VIRGIL BRANDON**, son, without any indication that he has been served with notice of this hearing or served a copy of the *Petition* that seeks to offset his share of distribution from the Decedent's estate. Despite the *Waiver of Accounting* filed 8/22/2016 signed by Chris Brandon, Court may require consent to or a proof of acknowledgment of receipt of service of notice of the proposed distribution to **CHRIS VIRGIL BRANDON**, to demonstrate his agreement to the following offsets to be deducted from his share, as stated in the *Petition*:
 - Deduction of **\$2,532.26** for ½ of unpaid rent due to Craig Joseph Brandon for the months of December 2015 to May 2016;
 - Deduction of **\$1,851.20** for attorney's fees to evict Chris Virgil Brandon from the residence so it could be sold;
 - Deduction of **\$94.07** for cable box lost by Chris Virgil Brandon.
7. Need proposed order pursuant to Local Rule 7.6.1, containing a statement as to the balance of the estate on hand, specifically noting the amount of cash included in the balance, and the amounts to be distributed.

Age: 2	<p style="text-align: center;"><u>TEMPORARY EXPIRES 10/03/2016</u></p> <p>MARTHA SOTO and JAVIER SOTO, paternal grandparents, are petitioners.</p> <p style="text-align: center;"><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 08/22/2016: Krista Espinosa, mother, represents that her father lives in Coeur d'Alene, Idaho. Martha Soto is sworn to testify and admits under oath that Osvaldo Soto, father, has been seeing the child despite the Court's order of 07/11/2016. The Court admonishes Martha and Javier Soto with regard to violating the Court's order and possible removal of the minor for doing so in the future. The Court reiterates its order that there is to be no visits or contact of any kind for Osvaldo Soto, father.</p> <p>Minute Order of 07/11/2016 states in part: The Court orders no visits with the father until he comes to court. Also, the Court orders supervised visitation by guardian for mother one Sunday each month for 2 hours from 11am to 1pm at McDonalds in Coalinga. No one allowed at visits except for mother's 5 year old daughter. The Court issues a temporary guardianship to preserve the status quo.</p>
Cont. from 071116, 082216		
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		Reviewed by: LV
		Reviewed on: 09/27/2016
		Updates:
		Recommendation:
		File 12- Soto

Status Re: Public Administrator's Findings

DOD: 6/8/02	SPECIAL ADMINISTRATION EXPIRED 6/13/16 (not extended)	NEEDS/PROBLEMS/COMMENTS: Note: On 8/18/16, the PA submitted a Request for Dismissal of the entire action; however, dismissal could not be administratively entered due to the PA's status as special administrator only.
Cont. from 061316	The FRESNO COUNTY PUBLIC ADMINISTRATOR was appointed Special Administrator per Order 4/18/16.	
Aff.Sub.Wit.	History: JUNUS B. PERRY, JR., Son, filed a petition for Letters of Administration on 11/13/15. The petition estimated real property valued at \$175,000.00.	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	After various hearings, and given the issues listed in the Examiner Notes, including but not limited to lack of publication and notice, the Court denied Mr. Perry's petition and appointed the PA to determine whether administration is necessary. Letters of Special Administration issued 4/18/16.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Status Report filed 8/9/16 states it has been determined that the entire parcel is valued at \$40-50,000, and the estate's interest only approx. \$10,000. Most if not all would be used for creditor's claims and mortgage. When this matter was first assigned to the PA, she intended to work with the other beneficiaries to sell the estate's interest to the co-owners; however, due to discord in the family, the PA has been unable to mediation a resolution. In addition, no payments have been made on the property for about a year. If that continues, the property will be lost to foreclosure. The PA acknowledges that the estate owns an interest in the property, but asserts that the asset is worthless due to it only being a partial interest in property that is likely upside-down. If the Court agrees based on this information, the PA requests the Court find there is no benefit to the estate for the PA to act as administrator and discharge the PA.	
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 9/26/16
		Updates:
		Recommendation:
		File 13- Perry

Status RE: Report from the Public Administrator

DOD: 10/31/15	<p>HISTORY: Kevin Earl Morris, Jr., grandson, filed a Petition for Probate of a will dated 1/22/90 on 1/26/16.</p> <p>Dale Boust, named executor of a will dated 10/21/15, filed an objection that stated there are insufficient assets to require a probate and made allegations regarding the petitioner.</p> <p>On 5/16/16, the Court denied the Petition and appointed the Public Administrator to review the estate, and set this status hearing re report from Public Administrator.</p> <p>Status Report filed 7/22/16 states the PA asserts there is no need for a probate of the estate. According to a declaration filed by Dale Boust, a longtime friend of the decedent and named executor in the decedent's will, a bank account with an approx. balance of \$85,000 had a "pay on death" provision naming Wayne Morris as beneficiary. That amount was collected via affidavit. See report re status of vehicle and personal property believed to be in possession of Kevin Morris, Jr. Mr. Boust stated he has a small bank account established for the estate with about \$1,500.00, from which he has been paying final debts, and will distribute the remainder to Wayne Morris, beneficiary of the original bank account. With the distribution of the payable on death account to the decedent's brother, there are an insignificant amount of estate assets to continue a court probate. The named executor has taken actions consistent with the will to settle the decedent's final affairs. Any action to recover the 10 year old care and personal property from Kevin Morris, Jr., should be pursued by the decedent's brother and daughter, who according to the will are 1/3 beneficiaries. The PA asserts that there is no estate to probate and requests this matter be closed and that she be discharged as administrator.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 8/29/16: Mr. Morris is to serve Heather Kruthers with all the documents that he has filed by 9/12/16.</p> <p>Note: Declaration of Kevin Earl Morris filed 9/27/16 contains a copy of a certified mail receipt indicating mailing to Ms. Kruthers on 9/3/16.</p> <p>Examiner's Note: Letters of Special Administration were requested from the PA rather than full appointment because the original petition for probate had not been published; therefore jurisdiction has not been established for this matter. It does not appear Letters haven been submitted for issuance.</p>
Cont. from 072516, 082916		
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Duties/Supp		
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Citation		
FTB Notice		
Reviewed by: skc		
Reviewed on: 9/26/16		
Updates: 9/27/16		
Recommendation:		
File 14- Morris		

Probate Status Hearing Re: Filing Inventory and Appraisal

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>OFF CALENDAR. Inventory and Appraisal filed on 6/7/16.</p>
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FTB Notice		
		Reviewed by: KT
		Reviewed on: 9/26/16
		Updates:
		Recommendation:
		File 15- Gonzalez

Petition for Order Confirming Successor Trustee and Trust Assets

<table border="1"> <tr><td>Marlene Bissell DOD: 10/2/04</td></tr> <tr><td>Gaylaird Bissell DOD: 12/10/14</td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td>Cont. from 082916</td></tr> <tr><td><input type="checkbox"/> Aff.Sub.Wit.</td></tr> <tr><td><input checked="" type="checkbox"/> Verified</td></tr> <tr><td><input type="checkbox"/> Inventory</td></tr> <tr><td><input type="checkbox"/> PTC</td></tr> <tr><td><input type="checkbox"/> Not.Cred.</td></tr> <tr><td><input checked="" type="checkbox"/> Notice of Hrg</td></tr> <tr><td><input checked="" type="checkbox"/> Aff.Mail w</td></tr> <tr><td><input type="checkbox"/> Aff.Pub.</td></tr> <tr><td><input type="checkbox"/> Sp.Ntc.</td></tr> <tr><td><input type="checkbox"/> Pers.Serv.</td></tr> <tr><td><input type="checkbox"/> Conf. Screen</td></tr> <tr><td><input type="checkbox"/> Letters</td></tr> <tr><td><input type="checkbox"/> Duties/Supp</td></tr> <tr><td><input type="checkbox"/> Objections</td></tr> <tr><td><input type="checkbox"/> Video Receipt</td></tr> <tr><td><input type="checkbox"/> CI Report</td></tr> <tr><td><input type="checkbox"/> 9202</td></tr> <tr><td><input checked="" type="checkbox"/> Order</td></tr> <tr><td><input type="checkbox"/> Aff. Posting</td></tr> <tr><td><input type="checkbox"/> Status Rpt</td></tr> <tr><td><input type="checkbox"/> UCCJEA</td></tr> <tr><td><input type="checkbox"/> Citation</td></tr> <tr><td><input type="checkbox"/> FTB Notice</td></tr> </table>	Marlene Bissell DOD: 10/2/04	Gaylaird Bissell DOD: 12/10/14			Cont. from 082916	<input type="checkbox"/> Aff.Sub.Wit.	<input checked="" type="checkbox"/> Verified	<input type="checkbox"/> Inventory	<input type="checkbox"/> PTC	<input type="checkbox"/> Not.Cred.	<input checked="" type="checkbox"/> Notice of Hrg	<input checked="" type="checkbox"/> Aff.Mail w	<input type="checkbox"/> Aff.Pub.	<input type="checkbox"/> Sp.Ntc.	<input type="checkbox"/> Pers.Serv.	<input type="checkbox"/> Conf. Screen	<input type="checkbox"/> Letters	<input type="checkbox"/> Duties/Supp	<input type="checkbox"/> Objections	<input type="checkbox"/> Video Receipt	<input type="checkbox"/> CI Report	<input type="checkbox"/> 9202	<input checked="" type="checkbox"/> Order	<input type="checkbox"/> Aff. Posting	<input type="checkbox"/> Status Rpt	<input type="checkbox"/> UCCJEA	<input type="checkbox"/> Citation	<input type="checkbox"/> FTB Notice	<p>WILLIAM BRADLEY BISSELL, Successor Trustee, is Petitioner.</p> <p>Petitioner states Trustors Gaylaird and Marlene Bissell created the Gaylaird K. Bissell and Marlene G. Bissell Family Trust on 5/31/04. Gaylaird was appointed as sole trustee and Petitioner was named as successor trustee. At all times herein, Marlene was represented by Gaylaird, her husband and attorney-in-fact under Durable Power of Attorney dated 9/17/02.</p> <p>The trust at Schedule A provides that the trustee has been or will be designated as owner of all real and personal property, and the trustors concurrently executed assignments assigning and transferring all right title and interest in and to their real and personal property. In addition, Gaylaird executed a pour-over will. Petitioner states the trust was later amended as to distribution; however, the distributive provisions are not at issue in this petition.</p> <p>Upon Marlene's death on 10/2/04, the trust estate was divided into two subtrusts: The Gaylaird K. Bissell Family Trust (Trust A) and the Marlene G. Bissell Family Trust (Trust B). Gaylaird remained the sole trustee of both trusts until 5/21/07, when he appointed Petitioner to serve with him as co-trustee. Gaylaird resigned as co-trustee on 2/5/09 and relinquished all duties to Petitioner as sole successor trustee.</p> <p>Contemporaneously with the creation of the family trust, the trustors executed a grant deed recorded 6/3/04 conveying certain residential real property to the trustee. (See petition for legal description and APN. See Exhibit K for common address.)</p> <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Page 18 is the related matter (Re: The Gaylaird K. Bissell Family Trust (Trust A), Case No. 16CEPR00741.</p> <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p> <hr/> <p>Reviewed by: skc</p> <p>Reviewed on: 9/26/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 17- Bissell</p>
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17 Re: The Marlene G. Bissell Family Trust (Trust B) Case No. 16CEPR00740

Page 2 – In 2010, Petitioner as successor trustee conveyed the subject property pursuant to the terms of the trust in equal undivided 50% interests to Trust A and Trust B.

Petitioner states in 2012, the Trustor applied to refinance the subject property, and the lender approved the Trustor's loan application on the condition that the Trustor hold title to the subject property in his individual capacity until the refinancing transaction was completed.

On or about 12/5/12, Petitioner as trustee granted the subject property to Gaylaird K. Bissell individually in compliance with the requirements of the refinancing lender, and the loan was approved. As part of the refinance escrow, a grant deed was prepared to accomplish reconveyance to the trust from the trustor, in his individual capacity, as intended by the trustors (unexecuted copy attached). Petitioner states he executed the Grant Deed as requested by the escrow holder; however, for reasons unknown, the escrow holder failed to effectuate recordation of any grant deed of reconveyance. (Petitioner states in retrospect, the reconveyance Grant Deed incorrectly identified Petitioner as the grantor rather than Gaylaird Bissell.)

As a result, at the time of his death in 2014, the subject property was held by Gaylaird K. Bissell in his individual capacity rather than in the trusts, as intended.

Petitioner is informed and believes that the trustor, through the error and omission of the refinancing escrow holder, did not complete the final step of trustor's refinancing plan by failing to reconvey the subject property to the trusts upon completion of the refinancing. Petitioner believes it was at all times the trustor's intent to maintain in place the estate plan and to distribute the family's estate through the trusts, and the trustor had no intent to alter the trusts or estate plan.

Petitioner states venue is proper in Fresno County as the real property, the principal place of administration, and Petitioner's attorneys are located in Fresno County, CA.

Petitioner prays for an order that:

1. The Marlene G. Bissell Family Trust (Trust B) under declaration of living trust dated 5/31/04 is valid;
2. The real property described herein is an asset of the Marlene G. Bissell Family Trust as to an undivided 50% interest, and subject to the management and control of William Bradley Bissell as sole successor trustee;
3. Successor Trustee William Bradley Bissell is empowered and authorized to engage in any conduct necessary to include the subject property in Trust B and to sell, grant, convey or transfer such property; and
4. For such other orders as the Court may deem proper.

Update: Prior Examiner Notes requested clarification regarding the refinance, as no documents appear to have been executed by Gaylaird Bissell himself, as well as a copy of the DPOA authorizing creation of a trust on Marlene's behalf. **Petitioner's Declaration filed 9/23/16 provides a copy of the DPOA and states** his father requested his assistance with administration of the trusts as serve with him as co-trustee, and by 2009 had decided to relinquish his duties as trustee to concentrate on preserving his health. in 2012, in consultation with his father and with his agreement, they investigated lending markets and determined that a lower interest rate could be obtained on the home, which would reduce the monthly payment on the loan balance, and decided to pursue refinancing, which led to the property being held by his father individually. See attached documents signed by Gaylaird Bissell as borrower.

Petition for Order Confirming Successor Trustee and Trust Assets

Marlene Bissell DOD: 10/2/04	<p>WILLIAM BRADLEY BISSELL, Successor Trustee, is Petitioner.</p> <p>Petitioner states Trustors Gaylaird and Marlene Bissell created the Gaylaird K. Bissell and Marlene G. Bissell Family Trust on 5/31/04. Gaylaird was appointed as sole trustee and Petitioner was named as successor trustee. At all times herein, Marlene was represented by Gaylaird, her husband and attorney-in-fact under Durable Power of Attorney dated 9/17/02.</p> <p>The trust at Schedule A provides that the trustee has been or will be designated as owner of all real and personal property, and the trustors concurrently executed assignments assigning and transferring all right title and interest in and to their real and personal property. In addition, Gaylaird executed a pour-over will. Petitioner states the trust was later amended as to distribution; however, the distributive provisions are not at issue in this petition.</p> <p>Upon Marlene's death on 10/2/04, the trust estate was divided into two subtrusts: The Gaylaird K. Bissell Family Trust (Trust A) and the Marlene G. Bissell Family Trust (Trust B). Gaylaird remained the sole trustee of both trusts until 5/21/07, when he appointed Petitioner to serve with him as co-trustee. Gaylaird resigned as co-trustee on 2/5/09 and relinquished all duties to Petitioner as sole successor trustee.</p> <p>Contemporaneously with the creation of the family trust, the trustors executed a grant deed recorded 6/3/04 conveying certain residential real property to the trustee. (See petition for legal description and APN. See Exhibit K for common address.)</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Page 17 is the related matter (Re: The Marlene G. Bissell Family Trust (Trust B), Case No. 16CEPR00740.</p> <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p>
Gaylaird Bissell DOD: 12/10/14		
Cont. from 082916		
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<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
<u>SEE ADDITIONAL PAGES</u>		
Reviewed by: skc		
Reviewed on: 9/26/16		
Updates:		
Recommendation:		
File 18- Bissel		

18 Re: The Gaylaird K. Bissell Family Trust (Trust A) Case No. 16CEPR00741

Page 2 – In 2010, Petitioner as successor trustee conveyed the subject property pursuant to the terms of the trust in equal undivided 50% interests to Trust A and Trust B.

Petitioner states in 2012, the Trustor applied to refinance the subject property, and the lender approved the Trustor's loan application on the condition that the Trustor hold title to the subject property in his individual capacity until the refinancing transaction was completed.

On or about 12/5/12, Petitioner as trustee granted the subject property to Gaylaird K. Bissell individually in compliance with the requirements of the refinancing lender, and the loan was approved. As part of the refinance escrow, a grant deed was prepared to accomplish reconveyance to the trust from the trustor, in his individual capacity, as intended by the trustors (unexecuted copy attached). Petitioner states he executed the Grant Deed as requested by the escrow holder; however, for reasons unknown, the escrow holder failed to effectuate recordation of any grant deed of reconveyance. (Petitioner states in retrospect, the reconveyance Grant Deed incorrectly identified Petitioner as the grantor rather than Gaylaird Bissell.)

As a result, at the time of his death in 2014, the subject property was held by Gaylaird K. Bissell in his individual capacity rather than in the trusts, as intended.

Petitioner is informed and believes that the trustor, through the error and omission of the refinancing escrow holder, did not complete the final step of trustor's refinancing plan by failing to reconvey the subject property to the trusts upon completion of the refinancing. Petitioner believes it was at all times the trustor's intent to maintain in place the estate plan and to distribute the family's estate through the trusts, and the trustor had no intent to alter the trusts or estate plan.

Petitioner states venue is proper in Fresno County as the real property, the principal place of administration, and Petitioner's attorneys are located in Fresno County, CA.

Petitioner prays for an order that:

1. The Gaylaird K. Bissell Family Trust (Trust A) under declaration of living trust dated 5/31/04 is valid;
2. The real property described herein is an asset of the Gaylaird K. Bissell Family Trust as to an undivided 50% interest, and subject to the management and control of William Bradley Bissell as sole successor trustee;
3. Successor Trustee William Bradley Bissell is empowered and authorized to engage in any conduct necessary to include the subject property in Trust A and to sell, grant, convey or transfer such property; and
4. For such other orders as the Court may deem proper.

Update: Prior Examiner Notes requested clarification regarding the refinance, as no documents appear to have been executed by Gaylaird Bissell himself. **Petitioner's Declaration filed 9/23/16 states** his father requested his assistance with administration of the trusts as serve with him as co-trustee, and by 2009 had decided to relinquish his duties as trustee to concentrate on preserving his health. In 2012, in consultation with his father and with his agreement, they investigated lending markets and determined that a lower interest rate could be obtained on the home, which would reduce the monthly payment on the loan balance, and decided to pursue refinancing, which led to the property being held by his father individually. See attached documents signed by Gaylaird Bissell as borrower.

Petitioner: Alicia Marie Cabrera (pro per)

Petition for Appointment of Guardian of the Person

		<p>THERE IS NO TEMPORARY. No temporary was requested.</p> <p>Alicia Cabrera, paternal aunt, is petitioner.</p> <p>Please see petition for details.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cont. from			
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<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			<p>Reviewed by: KT</p> <p>Reviewed on: 9/26/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 19- Cabrera</p>

20 Leslie and Jane Thonesen Revised and Restated Revocable Trust

Case No. 16CEPR00860

Attorney Jared R. Callister (for Petitioner Leslie Thonesen, Trustee)

Petition for Order Approving Modification and Termination of Trust under Probate Code Section 15409

Jane DOD: 5/22/2011	LESLIE THONESEN, Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	Petitioner states:	
Aff.Sub.Wit.	<ul style="list-style-type: none"> On 1/12/2000, Petitioner and his wife, JANE THONESEN executed a trust declaration creating the LESLIE THONESEN AND JANE THONESEN REVOCABLE TRUST, which was later revised and restated in its entirety on 2/14/2011, by trust agreement called the LESLIE AND JANE THONESEN REVISED AND RESTATED REVOCABLE TRUST (copy attached as Exhibit "A"); 	<ol style="list-style-type: none"> Pursuant to Probate Code § 15404(a), need written consent from the following persons identified as beneficiaries in the <i>Petition</i>: <ul style="list-style-type: none"> Dean Thonesen, son; Joan Taff, daughter; Neil Thonesen, grandson; Derek Thonesen, grandson; Michelle Alo, granddaughter.
✓ Verified	<ul style="list-style-type: none"> As was customary for estate plans at that time, the Trust provided that at the first settlor's death, the trust assets would be divided into two trusts—a "Bypass Trust" and a "Survivor's Trust"—typically referred to as an A/B trust arrangement; this A/B trust arrangement was typically used as a means of minimizing estate taxes and to ensure that each spouse's estate tax exemption was fully utilized; 	
Inventory	<ul style="list-style-type: none"> As set forth in the <i>Declaration of Leslie Thonesen</i> (attached as Exhibit "B"), in the absence of tax considerations, Petitioner and Mrs. Thonesen would have simply preferred that their assets pass outright to the surviving spouse, but based on the advice of counsel and in an effort to minimize taxes, Petitioner and Mrs. Thonesen signed the Trust that included an A/B trust arrangement; 	
PTC	<ul style="list-style-type: none"> As a result of Jane Thonesen's death, ½ of the trust estate was allocated to Sub-Trust known as the SURVIVOR'S TRUST and the other ½ of the trust estate was allocated to BYPASS TRUST (copy of Trust Asset Allocation Agreement attached as Exhibit C); 	
Not.Cred.	<ul style="list-style-type: none"> The current large estate tax exemption and portability rules make the existence of the Bypass Trust a non-necessity in order to avoid estate taxes; 	
✓ Notice of Hrg		
✓ Aff.Mail		
W/		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

~Please see additional page~

Petitioner states, continued:

- Petitioner is informed and believes that many of the assets allocated to the **BYPASS TRUST** have greatly appreciated so that if the **BYPASS TRUST** is not terminated, these assets will not benefit from the tax basis-step up rules at the time of Petitioner's death—leading to increased income taxes. Petitioner believes that the termination of the **BYPASS TRUST** could save ~\$500,000.00 in income taxes. Because of this unanticipated change in tax laws, Petitioner desires to modify and terminate the **BYPASS TRUST** so that all the Bypass Trust is terminated and assets are transferred to the **SURVIVOR'S TRUST**;
- It is clear that Petitioner and Mrs. Thonesen included the A/B sub-trust provisions in their Family Trust in order to minimize taxes (in particular estate taxes), which was a commonly used and recommended estate planning technique. In 2011 when the Petitioner and Mrs. Thonesen executed the Family Trust, they simply could not have anticipated the convoluted whirlwind of estate tax law changes that were on the horizon and that occurred from 2011 through 2013. At the time the Thonesens executed the Family Trust, they could not have reasonably anticipated that Congress would have continued to extend a relatively high exemption amount and make portability a permanent component of the law;
- These drastic changes in the law that occurred after execution of the Family Trust were reasonably not anticipated by the settlors and as a result, Will cause the trust to no longer meet the settlors' intended purposes of establishing the Family Trust in the first place. Simply put, requiring the continuance of the Bypass Trust will thwart the settlors' intended purposes of the Family Trust;
- It is important to note that the original purpose of mandating the creation and the funding of the Bypass Trust was to reduce taxes; with the increase in federal estate tax exemption, this **BYPASS TRUST** is no longer necessary to meet this purpose; if the **BYPASS TRUST** is not allowed to be terminated, Petitioner and the Trust beneficiaries will be in a worse-off position with respect to income taxes because at Petitioner's death the assets in the **BYPASS TRUST** will not receive any step-up in tax basis under IRC § 1014; thus under Probate Code § 15409 the Court is justified in modifying and terminating the **BYPASS TRUST** to allow all **BYPASS TRUST** assets to pass to the **SURVIVOR'S TRUST**;
- The Court is authorized to allow the requested modification and termination of the **BYPASS TRUST** based on its broad equitable powers and under California common law, as the unique and repeated changes to the estate tax laws during the period in question constituted peculiar or exceptional circumstance that would allow such modification and termination.

Petitioner prays for an Order approving the modification and termination of the BYPASS TRUST, so that the BYPASS TRUST be terminated and all assets of the BYPASS TRUST pass and transfer to the SURVIVOR'S TRUST.

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

DOD: 7/22/16		LEWIS R. NELSON , brother/named executor, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of holographic instrument.</p> <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Wednesday, March 8, 2017 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Wednesday, December 13, 2017 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. <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>
		All heirs waive bond.	
		Full IAEA – o.k.	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Holographic Will dated: 8/20/1988	
<input type="checkbox"/>	Inventory	Residence: Fresno	
<input type="checkbox"/>	PTC	Publication: Fresno Business Journal	
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	Estimated value of the estate:	
<input checked="" type="checkbox"/>	Aff.Mail	Personal property - \$120,000.00	
<input checked="" type="checkbox"/>	Aff.Pub.	Real property - \$ 60,000.00	
		Total - \$180,000.00	
	Sp.Ntc.	Probate Referee: Rick Smith	
	Pers.Serv.		
	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed by: KT	
		Reviewed on: 9/27/16	
		Updates:	
		Recommendation:	
		File 21- Nelson	

Petitioner Tony Prendez (Pro Per, son)

Attorney Nancy J. LeVan (Court-appointed for proposed Conservatee)

Petition for Appointment of Probate Conservator of the Person and Estate

		<p align="center">NO TEMPORARY REQUESTED</p> <p>TONY PRENDEZ, son, is Petitioner and</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p align="center">CONTINUED TO 10/26/2016 Per Petitioner's request</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input 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 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: 9/27/16
			Updates:
			Recommendation:
			File 22- Prendez

DOD: 07/20/2016		LISA M. GUZMAN, daughter/named executor without bond, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Full IAEA – o.k.	Note: If the petition is granted status hearings will be set as follows:
Cont. from		Will dated: 07/12/2016	<ul style="list-style-type: none"> • Monday, 03/06/2017 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Monday, 12/04/2017 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution.
<input type="checkbox"/>	Aff.Sub.Wit. s/p		
<input checked="" type="checkbox"/>	Verified	Residence: Fresno	
<input type="checkbox"/>	Inventory	Publication: The Business Journal	
<input type="checkbox"/>	PTC	Estimated value of the Estate:	
<input type="checkbox"/>	Not.Cred.	Personal property - \$350,500.00	
<input checked="" type="checkbox"/>	Notice of Hrg	Probate Referee: Steven Diebert	
<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: LV
			Reviewed on: 09/27/2016
			Updates:
			Recommendation: Submitted
			File 23- Guzman

DOD: 05/31/2016		<p>BRIAN FERGUSON, son, is petitioner and requests appointment as Administrator without bond.</p> <p>All heirs nominate petition and waive bond.</p> <p>Full IAEA – o.k.</p> <p>Decedent died intestate</p> <p>Residence: Fresno Publication: The Business Journal</p> <p>Estimated value of the Estate:</p> <table> <tr> <td>Real property</td> <td>-</td> <td>\$250,000.00</td> </tr> <tr> <td>Less encumbrances</td> <td>-</td> <td>\$240,000.00</td> </tr> <tr> <td>Total</td> <td>-</td> <td>\$10,000.00</td> </tr> </table> <p>Probate Referee: Rick Smith</p> <p>Petitioner states: decedent signed a form will ("Purported Will"), filed with the Court on 07/21/2016. The purported will, with blanks to be filled in to identify the decedent, the decedent's spouse, and the decedent's nominated executors. The blanks were filled in and the Purported Will was signed by the decedent, but the blanks for witnesses were not completed and the Purported Will was not witnessed.</p> <p>The typed portions of the Purported Will leave the decedent's estate to the decedent's spouse, if living, or if not, to the decedent's children. The Purported Will names the decedent's wife's parents, Jerry Dye and Donna Dye, as Executors.</p> <p>The decedent's wife died on 12/25/2010. The decedent is survived by his three children.</p> <p align="center"><u>Please see additional page</u></p>	Real property	-	\$250,000.00	Less encumbrances	-	\$240,000.00	Total	-	\$10,000.00	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Duties & Liabilities of Personal Representative, Mandatory Judicial Council Form DE-147.</p> <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Monday, 03/06/2017 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Monday, 12/04/2017 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>
Real property	-		\$250,000.00									
Less encumbrances	-		\$240,000.00									
Total	-		\$10,000.00									
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 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											
		<p>Reviewed by: LV</p> <p>Reviewed on: 09/27/2016</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 24- Ferguson</p>										

California Probate Code §6610(c) states that a will must be witnessed unless the proponent of the will establishes by clear and convincing evidence that, at the time the testator signed the will, the testator intended the will to constitute the testator's will.

At this time, there is no proponent of the Purported Will presenting evidence that, at the time the testator signed the will, the testator intended the will to constitute the testator's will.

The decedent's intestate estate will be distributed in the same manner, to the decedent's three surviving children, as it would have been distributed had the Purported Will been established as the decedent's will.

The Purported Will named Jerry Dye and Donna Dye as the decedent's executors. But Jerry Dye and Donna Dye have declined to act as executors.

The petitioner is petitioning to be appointed administrator of the decedent's intestate estate.

Petitioner: Edgar Ripley III (pro per)

Spousal or Domestic Partner Property Petition

DOD: 9/19/15		EDGAR LANE RIPLEY III, surviving spouse, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Need Amended petition based on but not limited to the following:</p> <ol style="list-style-type: none"> 1. Fee waiver was denied on 8/22/16. Therefore the \$435.00 filing fee is due. 2. Petition does not allege any facts for the court to determine that the property is community property and should pass/be conformed to petitioner. 3. #4c of the petition was not answered re testate/intestate 4. #5a(2) of the petition is not answered re: issue of a predeceased child. 5. #5b of the petition was not answered re: survived by stepchild/foster child. 6. Need attachment 7a and 7b providing the legal description of the real property (the APN alone is not enough). 7. #9 of the petition does not include the relationship to the decedent of the parties listed. 8. Proposed Order is incomplete 	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W/
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
<p>Reviewed by: KT</p> <p>Reviewed on: 9/27/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 25- Turner-Hope</p>				