

PROBATE NOTES: Friday, April 5, 2019

These notes are not updated based on subsequent filings once they are posted.

**PR10995                      Conservatorship of Timothy Majors**

Hearing types:                      (1) Further review re change of venue  
   (2) Order to show cause issued on February 22, 2019  
Conservators:                      Frank and Marilee Majors  
Conservators' counsel:        Jennifer J. Lothert

On January 25, 2019, this case was ordered to be transferred to Sacramento County, and Conservators were ordered to submit to this Court either the first-appearance fee of \$435 or a Request to Waive Court Fees (Judicial Council form FW-001-GC) no later than February 15, 2019. Because Conservators had not complied with the February 15, 2019, deadline, appearance was required at the hearing set for February 22, 2019. Because neither Conservators nor their counsel appeared at the February 22, 2019, hearing, an order to show cause re sanctions was issued on February 22, 2019. The hearings set for March 29, 2019, were then continued due to the unavailability of Conservators' counsel.

At the time of the Court's review of this case on April 3, 2019, the file still did not reflect that Conservators had submitted either a first-appearance fee or a completed fee-waiver request. Appearance of counsel required pursuant to the order to show cause.

**PR11436                      Conservatorship of Gary F. Poste**

Hearing type:                      Further review re second and final accounting  
Conservator:                      Tuolumne County Public Guardian  
Conservator's counsel:        County Counsel

At the time of the Court's review of this case on April 3, 2019, the file still did not reflect that the second and final accounting had been filed. Appearance required if it is not filed prior to the hearing.

**PR11474                      Conservatorship of Alice M. Moyle**

Hearing type:                      Further review re inventory and appraisal  
Conservator:                      Helen Moyle  
Conservator's counsel:        Jennifer J. Lothert

At the time of the Court's review of this case on April 3, 2019, the file still did not reflect that Conservator had resolved the issues that were the subject of the hearing on January 25, 2019. Appearance required if there is no resolution prior to the hearing.

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Hearing types: (1) Further hearing re court investigator's report (Prob. Code, § 1850)  
(2) Review re first accounting  
Conservator: Teresa Barnhart  
Conservator's counsel: Kimberly Sullivan Gray

At the time of the Court's review of this case on April 3, 2019, the file also did not reflect that Conservator had filed her first accounting. Appearance required if the accounting is not filed prior to the hearing.

Hearing type: Review re first accounting  
 Conservator: Teresa Barnhart  
 Conservator's counsel: Kimberly Sullivan Gray

At the time of the Court's review of this case on April 3, 2019, the file did not reflect that Conservator had filed her first accounting. Appearance required if the accounting is not filed prior to the hearing.

Hearing type: Petition for final distribution  
 Administrator: Shannon Rollins  
 Administrator's counsel: None

The Court has not yet considered the petition filed on March 12, 2019, because it is not verified. Administrator shall file either proper verification of the petition that was filed on March 12, 2019, or an amended petition for final distribution with the verification attached. The hearing will be continued to April 26, 2019, at 8:30 a.m. Appearance not required on April 5, 2019.

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**PR11529                      Estate of Ronald D. Jackson**

Hearing type:                      Further review re inventory and appraisal  
Administrator:                      Rona Lynn Jackson  
Administrator's counsel:      Gary P. Dambacher

At the time of the Court's review of this case on April 3, 2019, the file still did not reflect that Administrator had filed a final Inventory and Appraisal form. At the hearing on January 11, 2019, Administrator requested 30 days after distribution in related case PR10521 (Conservatorship of Ronald Jackson) to complete the inventory-and-appraisal process in the instant case. A further hearing re Conservator's fifth and final accounting is set for May 31, 2019, in PR10521. Accordingly, the instant hearing will be continued to July 5, 2019, at 8:30 a.m. Appearance not required on April 5, 2019.

**PR11578                      Conservatorship of Charles M. Clements**

Hearing types:                      (1) Further review re inventory and appraisal  
    (2) Orders to show cause issued on February 22, 2019  
Conservators:                      John and Liliana Vass  
Conservators' counsel:      None

At the time of the Court's review of this case on April 3, 2019, the file still did not reflect that Conservators had filed an Inventory and Appraisal form, filed proof of bond, or addressed the expiration of their powers on November 2, 2018, pursuant to the letters of temporary conservatorship issued on August 30, 2018. The Court acknowledges the declaration filed by John Vass on February 19, 2019, in response to the minute order dated February 8, 2019, requesting "cancellation" of the conservatorship. Appearance required pursuant to the orders to show cause issued on February 22, 2019.

**PR11600                      In the Matter of the Blagdon Trust**

Hearing type:                      Amended petition to modify terms of trust  
Petitioner:                      Linda Anne Menary  
Petitioner's counsel:      Joe Bautista

The Court has read and considered the amended petition filed on February 19, 2019. Appearance required to address the proposals to modify the terms of the trust to (1) add a statement re Settlor's intent and (2) bind "any individual residing in Settlor's residence" to a 30-day period to vacate the residence. The Court also notes that the proposed order (1) misstates which paragraphs of the trust instrument would be deleted and replaced and (2) provides for a 20-day period to vacate the residence, shorter than what is sought in the amended petition.

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**PR11606                      Estate of Mary Ann Marriott**

Hearing type:                      Third amended petition for probate of will and letters testamentary  
Petitioner:                          Wayne William Booth  
Petitioner's counsel:              None

The Court has not yet read and considered the petition filed on March 14, 2019, which it interprets to be a third amended petition for probate of lost will and letters testamentary. (Previous petitions were filed on October 3, 2018; December 10, 2018; and February 6, 2019.) It is unclear why Petitioner filed a third amended petition when the Court was prepared to grant the second amended petition upon resolution of the issues with proof of service and publication described in the minute order dated March 1, 2019. The Court also notes that the petition attached to the proof of service of Notice of Petition to Administer Estate that was filed on March 8, 2019—presumably to demonstrate that a copy of the petition was served by mail—is not a copy of the petition filed on March 14, 2019; the signatures on page 4 are different. In addition, the Court notes that the Notice of Petition to Administer Estate that was filed on March 8, 2019, erroneously states in the caption that the estate is that of Wayne William Booth (i.e., Petitioner); this error is likely to affect publication of the notice. At the time of the Court's review of this case on April 3, 2019, the file did not reflect that proof of publication of notice of the third amended petition had been filed. Appearance required to address the above issues.

**PR11607                      Matter of James William Brune**

Hearing type:                      Further hearing re amended petition to determine succession to real and personal property  
Petitioner:                          Joseph William Brune  
Petitioner's counsel:              None

The minute order dated March 22, 2019, indicated that the Court intends to grant the amended petition that was filed on March 4, 2019, but requires a revised proposed order. The hearing was continued to April 5, 2019, for receipt of the revised proposed order, and the clerk's office was ordered to mail a copy of the March 22, 2019, minute order to Petitioner. At the time of the Court's review of this case on April 3, 2019, the file did not reflect that the minute order had been mailed to Petitioner. Accordingly, the hearing will be continued again to April 26, 2019, at 8:30 a.m. to allow time for mailing of the minute orders dated March 22, 2019, and April 5, 2019, to Petitioner and for Petitioner to submit the revised proposed order as required. Appearance will not be required on April 5, 2019, but Petitioner may appear and bring copies of the revised proposed order if he so chooses. The probate notes for March 22, 2019, which specify what is required, can be accessed at <<http://www.tuolumne.courts.ca.gov/online-services/probate-notes-archive.shtml>>.

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**PR11635                      In re Disputed Claim of Grace Dickerson**

Hearing type:                      Further hearing re petition to approve compromise of disputed claim of a minor  
Petitioner:                          April Dickerson  
Petitioner's counsel:              None  
Claimant:                            Grace Dickerson  
Defendants:                          David Bell, Holly Bell, and CSAA, IE  
Defendants' counsel:                Bruce E. Leonard

The minute order dated March 22, 2019, indicated that the Court intends to grant the petition that was filed on January 4, 2019, as amended, but requires a revised proposed order. At the time of the Court's review of this case on March 29, 2019, the file did not reflect that a revised proposed order had been submitted. If the revised proposed order is not timely submitted for the hearing on April 5, 2019, the hearing will be continued again to April 19, 2019, at 8:30 a.m.

**PR11645                      In re Trust of Helen Edwards**

Hearing type:                      Petition to appoint successor trustee  
Petitioner:                          Stephen A. Derkum  
Petitioner's counsel:              Stephen A. Derkum (self-represented)

The Court has read and considered the petition filed on February 21, 2019. Appearance required.

**PR7726                        Conservatorship of Melissa R. Stone**

Hearing type:                      Further hearing re fourteenth account and report of conservators; petition for fees and costs  
Conservators:                      Michelle and Richard Stone  
Conservators' counsel:          Jennifer J. Lothert

At the time of the Court's review of this case on April 3, 2019, the file did not reflect that an amended accounting had been filed as required by the minute order dated February 1, 2019. Appearance required if it is not filed prior to the hearing.

**PR10697                      Guardianship of Emily Wrede**

Hearing type:                      Review re Confidential Guardianship Status Report  
Guardians:                          Carol and Eric Wrede  
Guardians' counsel:                None

At the time of the Court's review of this case on April 3, 2019, the file did not reflect that Guardians had filed the report. Appearance required if it is not filed prior to the hearing.

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**PR11154                      Guardianship of Isabelle Ferreira, et al.**

Hearing type:                      Review re Confidential Guardianship Status Reports  
Guardian:                          Carolyn Enriquez  
Guardian's counsel:              None

The Court has read and considered the reports filed on March 18, 2019. Appearance required.

Following completion of the 2019 annual review, this case will be transferred to Stanislaus County because Guardian and the wards have lived in that county for the past year and a half. Because there is no guardianship of the estate and a fee waiver previously was granted, this Court will waive its transfer fee. The Superior Court for the County of Stanislaus will require a first-appearance fee of \$435 or a Request to Waive Court Fees (Judicial Council form FW-001-GC); Guardian shall submit either the fee or a completed fee-waiver request to this Court no later than April 26, 2019, and this Court will transmit it, along with the file, to the Superior Court in Stanislaus County. A review hearing re change of venue will be set for May 10, 2019, at 9:30 a.m. to ensure Guardian has submitted the first-appearance fee or completed fee-waiver request as required.

**PR9263                      Guardianship of Aileena Dawn Schneider**

Hearing type:                      Review re Confidential Guardianship Status Report  
Guardians:                          Brenda and Sharron James  
Guardians' counsel:              None

The Court has reviewed the report filed on March 12, 2019, which is missing the following information:

1. Response to item 1e
2. Personal information about the ward at item 2
3. Name and address of the ward's current school at item 3a
4. Information about the ward's health at item 4a

Appearance required if the missing information is not filed prior to the hearing. Guardians may use Judicial Council form MC-030 (Declaration) to file the missing information.