

Timeline of Conservatorship Petition for Barbara and Ron Keller

All dates taken from filed court records

Date:	What:	Note:
4.26.21	Sharon calls Adult Protective Services (APS) to file a report regarding Ron and Barbara after a mental health crisis experienced by Ron on 4.20.21	An investigation was opened and the case was assigned to Social Worker Alma Barba
6.21.21	Original Conservatorship Petitions filed by Sharon Wolff for conservatorship of the estate	PR 2100161 Ronald W. Keller PR 2100162 Barbara L. Keller
6.25.21	Dr. Andrew Levine, Ph.D. of North Coast Neuropsychology conducts capacity evaluations of Barbara and Ron – referred by Open Door Community Health Center. Both are found to be “severely impaired cognitively” by Dr. Levine.	Dr. Levine’s Psychological Evaluation Report was completed on 7.8.21
7.20.21	Quest Court Investigator Samantha Wahl interviews Ron and Barbara in their Fortuna home (via Zoom) for initial conservatorship investigator’s report	Filed for the 7.29.21 initial hearing
7.22.21	Barbara’s medical provider at Open Door Community Health Center in Fortuna signs GC-335 Capacity Declaration stating she is legally incapacitated by Alzheimer’s and unable to provide consent.	Provided to APS for their own conservatorship referral to the Public Guardian office. Ron’s medical provider at Open Door had left the clinic so his GC-335 paperwork was not completed at the same time
On or about 7.22.21	Diana Mendonca and granddaughter drive up to Fortuna and take Ron and Barbara from their home to Diana’s residence in Citrus Heights	Public Guardian referral from APS is denied due to Keller’s being “out of jurisdiction”
7.23.21	Quest Court Investigator submits investigation report – declaring that both Ron and Barbara are “substantially unable to resist fraud or undue influence”	“daughter, Sharon Wolff, appears to be acting in Barbara’s best interests. Therefore, establishment of the conservatorship is respectfully recommended.”
7.29.21	First conservatorship hearing – Judge John Feeney	Continued for one week due to lack of filed proof of service and request to amend order form and re-file
8.5.21	Hearing continued – Judge Kelly Neel	Continued until 9.2.21 on request of Diana Mendonca with stated intent to file an opposition
8.17.21	Amended conservatorship petition filed by Sharon for Barbara – conservatorship of person and estate	Sharon had received a copy of the GC-335 Capacity Declaration for Barbara which was included in this amended petition.
8.24.21	Heather Allen, NP with Iris Health signs a GC-335 Capacity Declaration for both Ron and Barbara – declares them both legally incapacitated and in	This form requires the signature of a physician or a psychologist. Form was altered to add “Nurse

	need of placement into a locked facility	Practitioner” as having statutory authority to sign.
8.25.21	Attorney Hamer and Mendonca family secure Ron and Barbara’s signatures on a legal “nomination” document they created	Legal document states Ron and Barbara were choosing Royce Mendonca as their conservator.
8.26.21	Royce checks Ron and Barbara into a locked memory care unit – The Pines, A Merrill Gardens Community in Rocklin, CA.	Royce did not have legal authority to admit them or sign the financial agreements at this point.
8.26.21	Attorney Hamer files a conservatorship petition for Ron and Barbara on behalf of Royce Mendonca; and opposition to Sharon’s petition	Includes the legal “nomination” document
8.30.21	Attorney Hamer files Supplemental Declaration which disclosed that they had placed both Barbara and Ron into the care facility.	No explanation for why the placement change days prior to the next court hearing
9.2.21	Hearing continued – Judge Timothy Canning	Evidentiary hearing scheduled for 9.30.21 to review filed documents at Sharon’s urging (<i>transcript available</i>)
9.24.21	Quest Court Investigator Samantha Wahl submits amended investigators report for the competing petitions	Filed for a 9.30.21 hearing “undersigned finds that Sharon Wolff is acting in Barbara’s best interests, and was in fact nominated by Barbara and Ron to manage their estate while each had capacity. Therefore, establishment of the probate conservatorship of the person and estate of Barbara Keller with her daughter Sharon Wolff acting as her conservator is respectfully recommended.”
9.30.21	Evidentiary Hearing – Judge Timothy Canning Taken under submission	Judge Canning “I’m not needing to hear a restatement of what’s already been submitted” and “if you like to present anything that hasn’t been presented so far, you certainly would be welcome to do so.” We were not allowed to talk about the filed documents that that I had requested the hearing for. (<i>transcript available</i>)
12.10.21	Judge Timothy Canning issues order appointing Royce Mendonca as conservator for both Barbara and Ron	No stated reason in the order for why the recommendations of the court investigator (2x) were not accepted. Judge Canning stated that the legal nomination papers, signed one month <u>after</u> both Ron

		and Barbara were determined to lack legal capacity, were the controlling documents.
Critical Dates Regarding Legal Capacity		
7.8.21	Psychological Evaluation Report Completed by Dr. Andrew Levine, Ph.D.	Both Ron and Barbara are found to lack legal capacity by Dr. Levine.
7.22.21	Barbara's medical provider at Open Door Community Health Center in Fortuna signs GC-335 Capacity Declaration stating she is legally incapacitated by Alzheimer's; Dr. Levine's report is attached.	Ron's medical provider at Open Door had left the clinic so his GC-335 paperwork was not completed at the same time
7.23.21	Initial Conservatorship Investigator's Report submitted by Samantha Wahl of Quest Court Investigations	Both Ron and Barbara are found to be "substantially unable to manage their own financial resources or resist fraud or undue influence"
8.17.21	Amended conservatorship petition filed by Sharon for Barbara – conservatorship of person and estate.	Includes the GC-335 Capacity Declaration by Open Door Community Health with attached psychological evaluation report by Dr. Levine
8.24.21	Heather Allen, NP with Iris Health signs a GC-335 Capacity Declaration for both Ron and Barbara – declares them both unable to give informed consent due to mental incapacity	Form was altered to add "Nurse Practitioner" as accepted signature authority
8.25.21	Attorney Hamer and Mendonca family secure Ron and Barbara's signatures on a legal "nomination" document they created	Legal document states Ron and Barbara were choosing Royce Mendonca as their conservator
12.10.21	Judge Timothy Canning issues order based on that legal "nomination" paper being the controlling document. Finding that both Ron and Barbara had "sufficient capacity" to sign legal papers on August 25, 2021.	There is no mention of the earlier Capacity Declaration filed by Sharon or the findings of the court investigator that Ron and Barbara were unable to resist fraud and undue influence as of 7.23.21.