



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 01/08/18**

The notes on the following pages were updated approximately three court days prior to the hearing to reflect newly-filed documents. Documents filed now after that update typically will not be reviewed except on the date of hearing at the judge's discretion.

### **Destruction of Filed Documents:**

Shredding/destruction of all court documents filed and imaged before January 2011 will begin soon. All filed/imaged documents are shredded one year after filing pursuant to court policy. Any filed original documents not retrieved timely will be permanently lost. (Wills and codicils lodged into the will vault will not be affected.)

### **Contacting the Probate Examiners:**

Probate Examiners' email address: ProbateNotes@sb-court.org

Emails must have the case identification information and hearing time/date in the subject line. No attachments will be opened. Probate Examiners can only respond to inquiries regarding the meaning of comments in the notes. Please do not email to notify that documents have been filed, to request a confirmation whether documents have been received, or to request the clearing of notes. No legal or procedural advice may be given by examiners in response to your email.

12/07 ww (12/13/17 cs; 01/02/18 cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PROBATE**

-----  
DATE: 01/08/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1500910

CASE NAME: MTR OF LOUIS SANCHEZ ENCISO

HEARING: FIRST AND FINAL Account and Report of MARIA TRIMBLE and Petition for allowance of fees filed.

COUNSEL:

MIGUEL ENCISO

(PET)...PRO/PER

LOUIS SANCHEZ ENCISO

(DEC)...

MARIA TRIMBLE

(PET)...E JOAN NELMS

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Maria Trimble, daughter/executor

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

- 1 Assets on hand: \$225,000.00 in real property *if* property was not sold or \$0 if it was sold. **See note 5.**
- 2 Petitioner and Attorney request statutory fees of \$7,500.00. Calculated.
- 3 Attorney request extraordinary fees of \$9,973.75 for 27.45 hours at a combined rate of \$363.34/hour. Itemized. [LF pg. 30-39] **JTD**
- 4 Petitioner requests reimbursement for advanced costs in the amount of \$2,000.00. **Need** itemization.
- 5 Schedule B, Gain on Sales [LF pg. 24] indicates that real property was sold on 04/05/17. Court to clarify if property was actually sold as it is still listed for proposed distribution. [LF pg. 12]
  - a. Need copy of escrow closing statement for sale of real property *if* it was sold on 04/05/17 per Local Rule 20-910.
- 6 Proposed Order: 09/27/17; however, lien amount as to Elba Jimenez and Rolando Garcia, Jr. does not match amount in petition prayer.

RECOMMENDATION:

Need to clear note 4 then Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge for **01/14/19**.

(ww)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1501035

CASE NAME: FRANCES B. BOYD AKA FRANCES BERNICE BOYD ETC

HEARING:  
Accounting Review

COUNSEL:

NANCY VAN LEUVEN	(PET)...HARTNELL LAW GROUP
FRANCES B. BOYD	(DEC)...
BEVERLY WRIGHT	(PET)...HARTNELL LAW GROUP
TINA A BROOKS	(PET)...HARTNELL LAW GROUP
TRUST AND ESTATE SEARCH	(TP )...DAVID C TURPIN
SAYAKA TAKANO	(HINOJOSA & FORER LLP)
GORO TSURUDA	(HINOJOSA & FORER LLP)

**CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN**

**XREF: PROPS1501091** (Frances Boyd), **CONPS1500006**(Frances Boyd;11/14 First and final account)

GENERAL INFORMATION

Continued from **08/03/17**. Status report out for signature. Counsel for petitioner to give notice.

**Continued from 11/06/17 at request of counsel to file Accounting.**

THIS CASE SET FOR HEARING ON Accounting review/Status.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Letters of Administration issued to Beverly Wright & Tina Brooks, daughter and granddaughter, on 06/03/16; full authority, \$200,000 bond.
2. Final Inventory and Appraisal filed 10/13/16.
3. **Need** accounting or status report.

RECOMMENDATION

Inquire status of accounting. When the personal representative does not file an accounting or report as required, the court shall take action as specified in Pr.C. § 11050 et seq. (lc/ww/cs)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1501141

CASE NAME: MTR OF H.H. HILL  
HEARING: FIRST AND FINAL WAIVER OF Account and Report of SHARON J  
BLINCI and Petition for allowance of fees filed.

COUNSEL:

SHARON J BLINCI (PET)...KAREN J LA MADRID  
H H HILL (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON First and Final Waiver of Account; Petition for Allowance of Fees; and Petition for Final Distribution, by, Sharon Blinci, executor/daughter

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Sole heir waives accounting
2. Petitioner waives statutory fees.
3. Need assets on hand at end of accounting period.
4. Need detail schedules of receipts and gains or losses on sale, per CRC §7.550.
5. Need allegation whether the estate is solvent, per CRC §7.550.
6. Need bank statement to support ending balance per Local Rule 20-908.
7. Attorney requests statutory fees in the amount of \$4,171 . However, need attorney statutory compensation calculation to meet requirements of CRC §7.705
8. Need verified supplement indicating if cash has been invested and maintained in interest bearing account. Pr.C.§1064(a)(5).
9. Need petition to be verified per Pr.C. § 1021.
- 10.No proposed order. Submit after hearing.

RECOMMENDATION:

Need to clear notes 3-9, then Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **01/14/19**

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600145

CASE NAME: JEANNE BRALEY AHLFELDT TRUST DATED 8/25/01

**SEE ALSO 5**

HEARING:

Petition for Removal of Robert Ahlfeldt as successor co-trustee  
and etc

COUNSEL:

JEANNE GAIL SMITH	(PET)...MARK J. ANDREW FLORY
JEANNE BRALEY AHLFELDT TRUST	(TRU)...
ROBERT AHLFELDT	(OBJ)...JAMES B CHURCH

**XREF: CONPS1500316** *MTR OF BETTY MAY CAVENAUGH*

Currently under review by Legal Research.  
(LR)

Continued matter – Notice not re-reviewed.

(ww)

Future Hearing: 2/05/18-2/09/18 Court Trial

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600145

CASE NAME: JEANNE BRALEY AHLFELDT TRUST DATED 8/25/01

**SEE ALSO 4**

HEARING:  
Readiness Calendar

COUNSEL:

JEANNE GAIL SMITH	(PET)...MARK J. ANDREW FLORY
JEANNE BRALEY AHLFELDT TRUST	(TRU)...
ROBERT AHLFELDT	(OBJ)...JAMES B CHURCH

**XREF: CONPS1500316** *MTR OF BETTY MAY CAVENAUGH*

No Notes-Readiness- JTD.

(ww)

Future Hearing: 2/05/18-2/09/18 Court Trial

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1600472

**VACATED**

CASE NAME: ESTATE OF GARY DEE PINKERTON

HEARING:

Accounting Review

COUNSEL:

LEE JAY PINKERTON

(PET)...KEVIN M MAHAN

GARY DEE PINKERTON

(DEC)...

(ww)

Future Hearing: 2/13/18: Probate Status Report

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600803

CASE NAME: MTR OF THOMAS FREDERICK LIEDBLAD

**VACATED**

HEARING:

Accounting Review

COUNSEL:

DOUGLAS W LIEDBLAD

THOMAS FREDERICK LIEDBLAD

(PET)...PRO/PER

(DEC)...

#### GENERAL INFORMATION

**Continued from 11/27/17 non-appearance, no accounting filed.**

THIS CASE SET FOR HEARING ON Accounting review/Status.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Letters of Administration issued to Douglas Liedblad, on 09/21/16; full authority, no bond.
2. Final Inventory and Appraisal filed 01/18/17; however **need** bank statements in support of date of death balances for all accounts per Local Rule 20-908.
3. **Need** accounting or status report.

#### RECOMMENDATION

Need to clear note 2 & 3.

(ww/cs)



Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600902

CASE NAME: MARY K LATENDRESSE

HEARING:  
Accounting Review

COUNSEL:  
US TRUST BANK OF AMERICA (PET)...FULLERTON LEMANN SCHAEFER & DO  
MARY K LATENDRESSE (DEC)...  
FAMILY SERVICES OF REDLANDS (TP )...KATHLEEN B ALBREKTSON

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

#### THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Letters of Administration issued to U.S. Trust, Bank of America, Corporate Fiduciary, on 10/31/16; **limited** authority, no bond.
2. Final Inventory and Appraisal filed 03/08/17. Supplemental Inventory and Appraisal filed 0814/17.
3. Need accounting or status report.

#### RECOMMENDATION

Inquire status  
(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700913

CASE NAME: BARBARA J SCOTT

HEARING:

Petition for PETITION TO DETERMINE SUCCESSION OF REAL PROPERTY

COUNSEL:

MERRIE CHRIS SCOTT (PET)...GAUDY LAW, INC  
BARBARA J SCOTT (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Merrie Scott, daughter

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petitioner seeks 100% interest, in decedent's 50% interest; in real property per the will.
2. Section 5 re: property tax certificate is incomplete on Final Inventory and Appraisal. **Need** completed form.
3. **Need** Notice of hearing as to Jerry Warren, son.
4. ~Proposed Form Order: 10/06/17

#### RECOMMENDATION

Need to clear notes 2-3 the Court's discretion.

(ww)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700923

CASE NAME: FRANK GALIARDI, JR.

HEARING: re: Petition for Probate, Letters of Testamentary With  
Full Authority Under IAEA..

COUNSEL:

SEAN ODASSO	(PET)...PRO/PER
FRANK GALIARDI JR	(DEC)...
DAWN WELLS	(PET)...PRO/PER

GENERAL INFORMATION

**Letters of Special Administration granted on 12/11/17 to Sean Odasso, named executor and named trustee of decedent testamentary trust.**

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA, by Sean Odasso Executor/Trustee and by Dawn Wells, friend

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Will waives bond. Net estate value is \$89,450.73 with \$5,000 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code, § 8481(b)).
2. Question: The only named executor is Sean Odasso; however, petition includes Dawn Wells who has not signed required documents. Need further clarification.
3. Sections 6 and 7 of petition are incomplete. Need verified supplement.
4. Petition is not signed by Dawn Wells. Need verified supplement.
5. Duties and Liabilities is not signed by Dawn Wells. Need completed form.
6. **Notice of Petition to Administer Estate and proof of service filed 12/14/17; however, form is incomplete as to item 1 re name of estate; item 3 re name of petitioner; item 5 re IAEA administration; item 10 name of petitioner; need complete name of the person who served documents at the signature line; and need notice to all those listed in attachment 8 of Petition. Need proper notice.**
7. Need proof of publication
8. ~Proposed Form Order: 09/19/17

## RECOMMENDATION

Need to clear notes to 2-7, Court's discretion re bond. If approved, set Accounting/Status Review for **03/18/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1701171

CASE NAME: THE LUCY WEBB TRUST DATED 12/18/95

HEARING:

Petition for INSTRUCTIONS AND CONFIRMATION OF ASSETS

COUNSEL:

REBECCA L WEBB (PET)...ROBERT A COHEN  
THE LYCY WEBB TRUST (DEC)...

Currently under review by Legal Research

LR

NOTICE:

Notice given.

(ww)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**CONSERVATORSHIPS**

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DATE: 01/08/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1500320

CASE NAME: MARIEL BUSTAMANTE HERRERA

HEARING:

Hearing Re: Court Investigators Report Due

COUNSEL:

ALVARO BUSTAMANTE

(PET)...PRO/PER

LUZ MARIA HERRERA

(PET)...PRO/PER

MARIEL BUSTAMANTE HERRERA

(CEE)...

#### GENERAL INFORMATION

**Continued from 11/13/17. No appearance. Conservators to be present. Referred to CI.**

THIS CASE SET FOR HEARING ON Court Investigator's Report Due

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Matter set by Court on 09/11/17 at hearing re: Status re IRC report.
2. Attorney Candice Garcia-Rodrigo relieves as counsel for conservatee Mariel.
3. **CI report filed 11/20/17.**

#### RECOMMENDATION

Court's discretion.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PUBLIC GUARDIAN**

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DATE: 01/08/18      TIME: 10:00      DEPT: S35P  
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CASE#: CON PS1100135

CASE NAME: MTR OF STEWART EUGENE MEEHAN JR

**VACATE**

HEARING:

Hearing re Final Discharge

COUNSEL:

LINDA S GROSS

STEWART EUGENE MEEHAN JR

PUBLIC GUARDIAN

(CPE)...HARTNELL LAW GROUP

(CEP)...E JOAN NELMS

(SC )...COUNTY COUNSEL

GENERAL INFORMATION

**Continued from 11/13/17**

THIS CASE SET FOR HEARING ON Final Discharge.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. 3<sup>rd</sup> and final account of Linda Gross, former conservator, approved on 02/06/17.
2. **Need** receipt in regards to assets on hand being received by the Public Guardian, successor conservator of person and estate.
3. **Ex Parte Petition for Final Discharge and Order entered 12/28/17.**

RECOMMENDATION

Inquire status.

(ww/cs)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1100252

CASE NAME: PAUL JEFFERSON

**SEE ALSO 14A**

HEARING: re: REQUEST FOR REIMBURSEMENT BY SHIRLEY JEFFERSON

COUNSEL:

SONDRA JEFFERSON	(CPE)...CHO, SHEASBY, CHUNG & IGNACIO
PAUL JEFFERSON	(CEP)...SANDY TURNER
MATTHEW E SHAESBY	(PET)...MATTHEW E SHEASBY
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ANITA PETTI	(CPE)...LAW OFFICE OF MARY M. BADER
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
SHIRLEY M JEFFERSON	(CP )...CHRISTINA FERRANTE
DEMETRIUS JEFFERSON	(CE )...CHRISTINA FERRANTE
UTILITY MANUFATURING	(OBJ)...
ROBERT R. SHIRI	

GENERAL INFORMATION:

Matter was set on 10/23/17. Per minute order of On 04/10/17 Court ordered that Petitioner, Shirley Jefferson was to continue to pay all bills but will be reimbursed pending hearing.

THIS CASE SET FOR HEARING ON Request For Reimbursement By Shirley Jefferson

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petitioner, Shirley Jefferson (mother) requests reimbursement for money advanced on behalf of the Conservatee for the period of 12/01/16 to 05/30/17 in the amount of \$18,547.27 [Amended Itemized Accounting filed 10/26/17, LF p.6 – 12].
2. Amended itemized accounting filed 10/26/17 indicates the amount of \$900 for Desert Villas was inadvertently added to original itemized accounting and the amount of \$684 and \$120 were inadvertently left out from original accounting.

RECOMMENDATION:

Court's discretion.

(CS)

Future Hearings: 3/12/18: Hearing Re: Status of Social Security/C'torship of Person, Hearing Re: Request to Terminate Conservatorship, 7/30/18: Hearing Re: Amended Itemized Accounting & Request, Etc



Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1100252

CASE NAME: PAUL JEFFERSON

**SEE ALSO 14**

HEARING: Re: OSC RE DISCHARGE OF GUARDIAN AD LITEM

COUNSEL:

SONDRA JEFFERSON	(CPE)...CHO, SHEASBY, CHUNG & IGNACIO
PAUL JEFFERSON	(CEP)...SANDY TURNER
MATTHEW E SHAESBY	(PET)...MATTHEW E SHEASBY
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ANITA PETTI	(CPE)...LAW OFFICE OF MARY M. BADER
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
SHIRLEY M JEFFERSON	(CP )...CHRISTINA FERRANTE
DEMETRIUS JEFFERSON	(CE )...CHRISTINA FERRANTE
UTILITY MANUFATURING	(OBJ)...
ROBERT R. SHIRI	

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON OSC RE Discharge Of Guardian Ad Litem

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Matter set on 11/15/17 wherein Mitchell Roth made a motion of non-suit and requested OSC re discharge. Motion of non-suit was granted.

RECOMMENDATION:

Court's discretion.

(CS)

Future Hearings: 3/12/18: Hearing Re: Status of Social Security/C'torship of Person, Hearing Re: Request to Terminate Conservatorship,

7/30/18: Hearing Re: Amended Itemized Accounting & Request, Etc.

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1200188

CASE NAME: WALTER E DIBLING

HEARING:

Second Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
WALTER DIBLING (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Second and Account Current and Petition for Fees by Conservator of the Person and Estate, Public Guardian ["Petitioner"].

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Accounting period: 09/13/13 to 07/31/16.
2. Assets on Hand: \$3,974.00 consisting of \$2,174.00 in cash and the remainder in a burial trust.
3. Public Guardian requests fees totaling \$5,206.00. Approving and confirming \$4,006.00 will be deferred until such time as the conservatorship estate has sufficient funds for such purpose; approving and confirming \$1,200.00 which was previously collected by petitioner. Generally itemized.
4. County Counsel request fees in the amount of \$2,706.00. Approving and confirming and \$2,106.00 will be deferred until such time as the conservatorship estate has sufficient funds for such purpose; approving and confirming \$600.00 was previously collected by petitioner. Generally itemized.
5. ~Proposed Order 08/17/17

RECOMMENDATION:

Court's discretion. If approved, set for next Accounting Review in 60 days as second account current is overdue.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1300120

CASE NAME: WILLIAM GEORGE SCHWINGENSCHLOEGL

HEARING:  
Accounting Review

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
WILLIAM GEORGE SCHWINGENSCHLOE (CEP)...HARTNELL LAW GROUP

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Second Account for Public Guardian approved on 08/22/17.
2. Notice of that Conservatee passed away on 06/28/17 filed.
3. Need final pre and post death accountings per Pr.C. §2620.

#### RECOMMENDATION

Inquire status of accounting.  
(cs)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1300129

CASE NAME: OLEN RALPH BALES

HEARING:  
Hearing re Final Discharge

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
OLEN RALPH BALES	(CPE)...HARTNELL LAW GROUP
SHERRI L KASTILAHN	(PET)...SHERRI L KASTILAHN
TENNA VAUGHN COOK	(TP )...THOMAS G MARTIN

GENERAL INFORMATION

**Continued from 12/06/17. No appearance.**

THIS CASE IS SET FOR HEARING ON Final Discharge

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. First and Final Account for Public Guardian approved on 11/28/16.
2. **Need** receipt from Tenna Vaughn Cook, administrator of Estate of Olen Bales.
3. **Need** Ex Parte Petition for Final Discharge and Order form GC-395.

RECOMMENDATION

Inquire status.

(lh/ww)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1300199

CASE NAME: Glenna Ada Beckman

HEARING:  
Hearing Re: ACCOUNTING REVIEW

COUNSEL:  
PUBLIC GUARDIAN (CE/CPE )...COUNTY COUNSEL  
GLENN A DA BECKMAN (CTE/CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION:  
**Continued from 04/10/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Order Settling First Account entered 04/13/15; second account now due beginning 08/01/14.
2. No account or waiver of account filed. Need same.

RECOMMENDATION:  
Inquire Status.  
(nb/cs)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1500089

CASE NAME: Irethea Ricks

HEARING: FIRST Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:  
PUBLIC GUARDIAN (PET)...COUNTY COUNSEL  
IRETHEA RICKS (CEP)...HARTNELL LAW GROUP

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period 04/10/15 to 05/31/16
2. Assets on hand \$1,649.04 consisting of cash.
3. Public Guardian requests fees totaling \$2,600.00 to be approved and confirmed. Generally itemized. JTD.
4. County Counsel request fees totaling \$1,300.00 to be approved and confirmed. Generally itemized. JTD.
5. Notice given.
6. Proposed Order 09/01/17

#### RECOMMENDATION:

Court's discretion. If approved, set hearing on next account review for **03/05/18**. Accounting to be filed 30 days' in advance.

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1600184

CASE NAME: MTR OF PATRICIA WISE

HEARING:  
Accounting Review

COUNSEL:  
PUBLIC GUARDIAN (PET)...COUNTY COUNSEL  
PATRICIA WISE (PCE)...EDWARD B FISCHER

GENERAL INFORMATION

**Continued from 12/06/17. No appearance.**

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. PG appointed Conservator of the person and estate on 09/26/16, no bond.
2. Final Inventory and Appraisal filed 08/15/17.
3. Notice of death of conservatee filed on 02/23/17.
4. **Need** final pre and post death accountings per Pr.C. §2620(b).

RECOMMENDATION

Inquire status of accounting.

(lh/ww/cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

-----  
DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1600263

CASE NAME: SHELBY JEAN MORGAN-PETRIZZI

**SEE ALSO 22 22A**

HEARING:

Hearing Re: Status of Sale of Residence

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
SHELBY JEAN MORGAN-PETRIZZI	(CEP)...ROSE C ROSADO
ROSE C. ROSADO	(PET)...ROSE C ROSADO

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status of Sale of Residence

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. On 08/07/17 authority to sell conservatee's personal residence approved and matter referred to Court Investigators to discuss the proposed sale with conservatee.
2. CI report filed 10/23/17.

#### RECOMMENDATION

Inquire status.

(ww)

Future Hearing: 3/26/18: Accounting Review



Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

-----  
DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1600263

CASE NAME: SHELBY JEAN MORGAN-PETRIZZI

**SEE ALSO 21 22A**

HEARING:

Petition for attorney's fees for compensation for services  
rendered to conservatee and etc

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
SHELBY JEAN MORGAN-PETRIZZI	(CEP)...ROSE C ROSADO
ROSE C. ROSADO	(PET)...ROSE C ROSADO

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Rose Rosado.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petitioner, Rose Rosado, was appointed as counsel on 09/12/16.
2. Petitioner requests fees of \$3,337.50 for 13.00 hours at \$150/300 per hour for paralegal and attorney services. Itemized [LF pgs. 5-7]. **JTD**
3. Petitioner indicated that the County of San Bernardino has paid \$700.00 for work completed from 09/12/16-03/08/17 and that she would reimburse the County upon payment of her fees.
4. **Need** notice of hearing and proof of service.
5. ~Proposed Order: 10/30/17

#### RECOMMENDATION

Need notice the Court's discretion.

(ww)

Future Hearing: 3/26/18: Accounting Review

Superior Court of Calif, County of San Bernardino  
Page: 22A add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1600263

CASE NAME: SHELBY JEAN MORGAN-PETRIZZI

**SEE ALSO 21 22**

HEARING: Report Sale & Petition for Order Confirming Sale of Real Property

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
SHELBY JEAN MORGAN-PETRIZZI	(CEP)...ROSE C ROSADO
ROSE C. ROSADO	(PET)...ROSE C ROSADO

Address: 3918 Conejo Drive, San Bernardino, CA 92404

Appraised Value: \$215,000.00

Sale price: \$215,000.00

First overbid: \$226,250.00

Deposit: \$21,000.00

Commission: 6% (\$12,900.00)

Additional bond: no bond.

Reason for Sale: Necessary to pay expenses of Conservatee.

Exposure to Market: Published in the local newspaper, Notice of Sale was posted in three places: San Bernardino County Courthouse, Office of Public Guardian Lobby, and Public Guardian/Public Administrator Warehouse.

Notice: Need notice to Cynthia Morgan and Michael Morgan and Posting by clerk. Per register of actions, Notice of Hearing filed 12/21/17; however, not in Laserfiche at time of review.

Future Hearing Dates: Accounting Review 03/26/18

~Proposed Form Order: 12/18/17

(cs)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18      TIME: 10:00      DEPT: S35P  
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CASE#: PRO PS1500648

CASE NAME: MTR OF PATRICIA MAE SWAIN

HEARING:

Probate status report filed.

COUNSEL:

PUBLIC ADMINISTRATOR	(PET)...CRAIG M PARKER
PATRICIA MAE SWAIN	(DEC)...
TERESA L ADMIRE	(PET)...SCOTT A HANCOCK
LINDSAY BOSTON	(PET)...SCOTT A HANCOCK
DANIEL CLOUSER	(PET)...SCOTT A HANCOCK
MISTY APRIL CRONAN	(PET)...SCOTT A HANCOCK
TONYA L CROSIER	(PET)...SCOTT A HANCOCK
LEONARD J EBREY	(PET)...SCOTT A HANCOCK
RICHARD L EBREY	(PET)...SCOTT A HANCOCK
SANDRA K FORD	(PET)...SCOTT A HANCOCK
ERIC F FULLER	(PET)...SCOTT A HANCOCK
CATHY L HARTE	(PET)...SCOTT A HANCOCK
DIANA L HOOTS	(PET)...SCOTT A HANCOCK
REBECCA L HOWELL	(PET)...SCOTT A HANCOCK
PAMELA SUE KILMER	(PET)...SCOTT A HANCOCK
DOROTHY M KNOX	(PET)...SCOTT A HANCOCK
PEGGY A LANE	(PET)...SCOTT A HANCOCK
PEGGY L LARSON	(PET)...SCOTT A HANCOCK
MARY LAUGHARY	(PET)...SCOTT A HANCOCK
SAMANTHA MCBRIDE	(PET)...SCOTT A HANCOCK
BARBARA JEAN MOSLEY	(PET)...SCOTT A HANCOCK
BOYD R MOSLEY	(PET)...SCOTT A HANCOCK
CHRISTOPHER DEAN MOSLEY	(PET)...SCOTT A HANCOCK
DAVID H MOSLEY	(PET)...SCOTT A HANCOCK
GARY L MOSLEY	(PET)...SCOTT A HANCOCK
JOHN STEVEN MOSLEY JR	(PET)...SCOTT A HANCOCK
LLOYD J MOSLEY	(PET)...SCOTT A HANCOCK
RACHEL A MOSLEY	(PET)...SCOTT A HANCOCK
SCOTT LEE MOSLEY	(PET)...SCOTT A HANCOCK
VELMA M MOSLEY	(PET)...SCOTT A HANCOCK
CAROL SUE NOLTE	(PET)...SCOTT A HANCOCK

DANA L SOLTE	(PET)...SCOTT A HANCOCK
JUDITH K OGLE	(PET)...SCOTT A HANCOCK
MELISSA RAMSAY	(PET)...SCOTT A HANCOCK
SONYA L ROWE	(PET)...SCOTT A HANCOCK
RUBEN J ROYER	(PET)...SCOTT A HANCOCK
POLLY SAMPSON	(PET)...SCOTT A HANCOCK
RICHARD W SMITH	(PET)...SCOTT A HANCOCK
BERRY MOSLEY STILL	(PET)...SCOTT A HANCOCK
MARILYN J TRUITT	(PET)...SCOTT A HANCOCK
JANET WALKER	(PET)...SCOTT A HANCOCK
NORMAN T WALKER	(PET)...SCOTT A HANCOCK
DONNA F WESTERFIELD	(PET)...SCOTT A HANCOCK
LADONNA ANN WILCOX	(PET)...SCOTT A HANCOCK
DEBORAH JEAN ZULAUF	(PET)...SCOTT A HANCOCK
WILLIAM E CLINE jr	(PET)...SCOTT A HANCOCK
SANDRA S DAVID	(PET)...SCOTT A HANCOCK
JAMES A DEHNER	(PET)...SCOTT A HANCOCK
LORRI L GLOSSOP	(PET)...SCOTT A HANCOCK
RAHN HEART	(PET)...SCOTT A HANCOCK
JOYCE KAY HUGHES	(PET)...SCOTT A HANCOCK
ALLISON TRACEY HUTTON	(PET)...SCOTT A HANCOCK
LESLIE ANN LINDSLEY	(PET)...SCOTT A HANCOCK
DIANNE KATHLEEN LORENZ	(PET)...SCOTT A HANCOCK
JUDY MCCLEARY	(PET)...SCOTT A HANCOCK
JANIS CLINE MCCURLEY	(PET)...SCOTT A HANCOCK
SHARON M MIDDENDORF	(PET)...SCOTT A HANCOCK
CONNIE L MORRIS	(PET)...SCOTT A HANCOCK
DEE W MURPHY	(PET)...SCOTT A HANCOCK
JEANETTE L NEIDERHISER	(PET)...SCOTT A HANCOCK
BARTON K PEVEY	(PET)...SCOTT A HANCOCK
CARL L PEVEY	(PET)...SCOTT A HANCOCK
DANA ALAN PEVEY	(PET)...SCOTT A HANCOCK
RICHARD L PEVEY	(PET)...SCOTT A HANCOCK
JONELLE REXENES	(PET)...SCOTT A HANCOCK
CAROL A SEYMOUR	(PET)...SCOTT A HANCOCK
JANET TRONE	(PET)...SCOTT A HANCOCK
THOMAS L WALKER	(PET)...SCOTT A HANCOCK
MELISSA K FARLEY	(TP )...SCOTT A HANCOCK
TWYLA LOUISE PITTMAN	(SCOTT A HANCOCK )
RHONDA ROYER	(SCOTT A HANCOCK)
SCOTT ROYER	(SCOTT A HANCOCK)
NORMA JEAN DEORNELLAS	(SCOTT A HANCOCK )
LORI P DEVAUGHN	(SCOTT A HANCOCK)
LESLIE DAWN PEVEY	(SCOTT A HANCOCK)
LYNN D PEVEY	(SCOTT A HANCOCK )

GENERAL INFORMATION:  
**Continued from 02/07/17**

THIS CASE IS SET FOR HEARING ON Status Report.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Probate status report was approved on 02/07/17 and matter was continued to clear probate notes.
2. Petitioner, Public Administrator, alleged the estate was not in a condition to be closed as Petitioner had possibly located an additional account at Wells Fargo Bank and was attempting to collect said account.
3. Petitioner requested an additional 12 months to close the estate.
4. Need accounting or updated status report.

RECOMMENDATION:

Need to clear note 4. Inquire status. If approved, set next hearing for Accounting Review for **04/09/18**.

(nb/cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

-----  
DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: PRO PS1600173

CASE NAME: MTR OF CHARLES WETZEL

HEARING:  
Accounting Review

COUNSEL:

ANNETTE WETZEL (PET)...PRO/PER  
CHARLES WETZEL (DEC)...

#### GENERAL INFORMATION

Continued from **08/21/17**. Counsel for the Department of Aging and Adult Services received a subpoena for records in this case by attorney Tyler Brown on behalf of Annette Wetzel and needs additional time to comply with the subpoena.

**Continued from 10/02/17 specially set at 10:00am.**

THIS CASE SET FOR HEARING ON Accounting review/Status.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Letters of Administration issued to Annette Wetzel, spouse, on 06/13/16 full authority, no bond.
2. **Need** final Inventory and Appraisal
3. **Need** accounting or status report.

#### RECOMMENDATION

Need to clear notes 2 & 3.

(ww/nb/ww)

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: PRO PS1701185

CASE NAME: THE THELMA JONES LIVING TRUST

HEARING:

Petition for Appointment of the Public Guardian as Successor  
Trustee of the Thelma Jones Living trust

COUNSEL:

PUBLIC GUARDIAN (PET)...COUNTY COUNSEL  
THE THELMA JONES LIVING TRUST (TRU)...

**X-REF CONPS1600081 (Thelma Jones Conservatorship)**

Currently under review by Legal Research  
(LR)

Notice:

1. Copy of Trust not provided:
2. Need Notice to Public Administrator, all trustees, and all beneficiaries.
3. Notice filed 11/30/17 as to Thelma Jones Living trust, Shirley Cook, Alice Jordan and Saunders Jordan (sibings); and Nicole Jordan (niece).

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: SC SS02958

CASE NAME: MTR OF MARION MCNAUGHT

HEARING:  
Accounting Review

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
MARION MCNAUGHT (CEP)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. 6<sup>th</sup> accounting of PG approved on 07/25/16.
2. Notice of conservatee's death filed 12/14/17.
3. **Need pre and post 7<sup>th</sup> account beginning with date of 08/01/15, per Pr.C 2620(b).**

#### RECOMMENDATION

Inquire status of accounting.

(ww/cs)



Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

-----  
DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: SC SS4946

CASE NAME: IN THE MTF OR KAREN MAREE SHANNON

HEARING:  
Accounting Review

COUNSEL:  
KAREN MAREE SHANNON (CEP)...  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

GENERAL INFORMATION

**Continued from 04/27/17 to file accounting.**

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Order Settling Twenty-Fourth Account entered 02/08/16; Twenty-Fifth Account now due.
2. No account or waiver of account. Need same.

RECOMMENDATION:

Inquire status.  
(nb/cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: SC SS7902

CASE NAME: IN THE MTR OF BRUCE MCCAIN

HEARING:  
Accounting Review

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
BRUCE MCCAIN (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

**Continued from 10/03/16 and 04/10/17.**

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. 24<sup>th</sup> account by PG approved on 10/20/14.
2. **Need** 25<sup>th</sup> accounting beginning with date of 01/11/14.

RECOMMENDATION:  
Inquire status of accounting.

(lc/nb/ww)

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: SLC SS01574

CASE NAME: MATTER OF JOHN FINLEY

HEARING:  
Accounting Review

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
JOHN FINLEY (CEP)...HARTNELL LAW GROUP

#### GENERAL INFORMATION

Letters expire 11/17/18

Continued from **05/02/16** at request of counsel. The accounting is to be brought current and filed.

Continued from **11/14/16 and 03/13/17** at request of counsel.

**Continued from 06/05/17 to file accounting. Court notes that it is not transferring this case to Los Angeles County.**

THIS CASE IS SET FOR HEARING ON accounting review

#### THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. On 4/27/15 Court approved a Waiver of account for the period ending 8/27/14.
2. Need account or waiver of account.
3. Conservatee appears to reside in Norwalk, CA. Court determined case will not be transferred to Los Angeles County.

#### RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(sa/nb/cs)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

-----  
DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: SLC SS02642

CASE NAME: MTR RE DREW HARRIS

HEARING:

Petition for AUTHORITY TO ESTABLISH AN IRREVOCABLE BURIAL TRUST

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
DREW HARRIS (CEP)...HARTNELL LAW GROUP

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition to establish Irrevocable Burial Trust by Public Guardian.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED

1. Petitioner alleges the current assets on hand are \$13,749.59, that there are sufficient funds to provide for conservatee's ongoing care and to establish a burial trust, and that the eligibility criteria for Social Security Disability does not allow for the recipient's account exceed \$2,000.
2. Petitioner requests authority to deposit up to \$5,000.00 in an Irrevocable Burial Trust.
3. ~Proposed Order: 09/14/17

RECOMMENDATION:

Court's discretion.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

-----  
DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: SLC SS02682

CASE NAME: MTR RE JOSEPH LAWRENCE

HEARING:  
Accounting Review

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
JOSEPH LAWRENCE (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 08/22/18.

**Continued from 11/21/16 and 04/10/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Ex Parte Order that Conservator need not present Sixth Account entered 12/15/15;  
**account or waiver of account now due.**
2. **Proof of service of Seventh Account Waiver filed.**

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(nb/cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

-----  
DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: SLC SS3880

CASE NAME: IN MTTR OF SUZANNE MC AFEE

HEARING:  
Accounting Review

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
SUZANNE MC AFEE (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expired 04/03/16

**Continued from 04/25/16, 10/31/16 and 04/10/17.**

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Conservatee died 10/03/15.
2. Ex Parte Order that Conservator need not present 10<sup>th</sup> Account approved on 03/25/15.
3. **Need** 11<sup>th</sup> and final accounting including pre and post death beginning with date of 12/03/14.

RECOMMENDATION:

Inquire status of accounting. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(dl/nb/ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: SLC SS5916

CASE NAME: IN THE MATTER OF KATHERINE EVANS

HEARING:  
Accounting Review

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
KATHERINE EVANS (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 04/15/18.

**Continued from 12/19/16 and 06/05/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Ex Parte Order that Conservator need not present 15<sup>th</sup> Account entered 02/23/16; account or waiver of account now due starting 11/01/15.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(nb/cs)

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Page: 33A add-on  
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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: SLC SS02203

CASE NAME: MTR OF LAWRENCE SMITH

HEARING:  
Accounting Review

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
LAWRENCE SMITH (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

LPS Letters expired 10/17/15.

Continued from **2/29/16** and **08/22/16**.

Continued from **03/20/17**. Counsel indicates that the conservatee passed away on 09/27/15.

**Continued from 12/15/17 Court's own motion accounting presently set is ordered reset for 01/08/17.**

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Ex Parte Order that Conservator need not present 5<sup>th</sup> Account approved on 04/30/15.
2. **Need** Notice of Death of Conservatee.
3. **Need** 6<sup>th</sup> and final accounting including pre and post death balances beginning with date of 02/25/15.

RECOMMENDATION:  
Inquire status.

(dl/sa/nb/ww/cs)



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**CONSERVATORSHIPS**

-----  
DATE: 01/08/18      TIME: 10:00      DEPT: S35P  
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CASE#: VC VS00393

CASE NAME: CONSERVATORSHIP OF JOHN DAVID SCHOLES

**SEE ALSO 35**

HEARING: Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of LILY A FARNSWORTH

COUNSEL:

LILY A FARNSWORTH

(PET)...PRO/PER

JOHN DAVID SCHOLES

(CTP)...SHERRI L KASTILAHN

AMANDA ANN HART

(PET)...PRO/PER

GENERAL INFORMATION

Order appointing Successor Conservator, Amanda Ann Hart, entered 07/28/16, person only, no bond.

Continued from **02/27/17**. Court refers this case to the Public Guardian- oral report given by Roberta Taylor. Citation issued to: Amanda Ann Hart

Continued from **04/03/17**. Oral Report given by Roberta Taylor who is relieved as counsel of record. Attorney Sherri L. Kastilahn appointed. Notice by Judicial Assistant.

Continued from **05/15/17** at request of counsel. Present in court is nephew of John Scholes. Court discharges PG from this case.

**Continued from 06/19/17, 07/31/17 and 10/02/17.**

THIS CASE IS SET FOR HEARING ON Compliance Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. **On 10/02/17 Court suspended powers of the conservator, Amanda Hart and a citation was issued to appear.**
2. Notification of Conservatee's Rights filed.
3. Care Plan filed.
4. Determination of Conservatee's Appropriate Level of Care filed.
5. Report by court appointed counsel, Roberta Taylor, filed 02/14/17.

RECOMMENDATION:

None.

(nb/ww/cs)

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/08/18 TIME: 10:00 DEPT: S35P  
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CASE#: VC VS00393

CASE NAME: CONSERVATORSHIP OF JOHN DAVID SCHOLES

**SEE ALSO 34**

HEARING:

Hearing Re: OSC RE SETTING UP REPRESENTATIVE PAYEE

COUNSEL:

LILY A FARNSWORTH	(PET)...PRO/PER
JOHN DAVID SCHOLES	(CTP)...SHERRI L KASTILAHN
AMANDA ANN HART	(PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE SET FOR HEARING **OSC** Re Setting Up Representative Payee

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Matter set on 10/02/17 wherein Court suspended power of the Conservator, Amanda Hart. Court ordered payment/funds to only be paid to Conservatee, John David Scholes personally and not anyone else pending further order of the court.
2. Citation issued for Amanda Ann Hart to appear on 01/08/18.

RECOMMENDATION:

None

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **MISC.**

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DATE: 01/08/18 TIME: 1:30 DEPT: S35P  
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CASE#: PRO PS1600911

**VACATED**

CASE NAME: THERESA AILEEN CORTEZ LIVING TRUST

HEARING:

Hearing Re: COURT TRIAL- FIRST DAY OF TRIAL

COUNSEL:

BRENDA SIERDSMA (PET)...WEINSTOCK MANION

THERESA AILE EN CORTEZ LIVING TRUST (TRU)...

PAUL VANDEN PIERCE (OBJ)...LAW OFFICES OF LAYNE A BARTHOL

Counsel represents matter has been settled. Matter dismissed by Court on 12/12/17.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **PROBATE**

-----  
DATE: 01/08/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO DS1000614

CASE NAME: MTR OF JOSEPH JOHN ALLEGRA

HEARING:

Probate status report filed.

COUNSEL:

GAYLE ALLEGRA

(PET)...GREGORY T ANNIGIAN

JOSEPH JOHN ALLEGRA

(DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Letters of Administration issued to Gayle Allegra, spouse, on 11/01/10; full authority, no bond.
2. Previous status report approved on 07/17/17
3. **Need** Final Inventory and Appraisal
4. **Need** accounting as status report will not be accepted per Court.

#### RECOMMENDATION

Inquire status of accounting and Final Inventory and Appraisal.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 01/08/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1100815

CASE NAME: LUIS F AVALOS SPECIAL NEEDS TRUST

**SEE ALSO 3**

HEARING:

Petition for AUTHORITY TO SELL AND PURCHASE REAL PROPERTY

COUNSEL:

BANK OF THE WEST (PET)...BURGH, BALIAN & BERGSTEIN  
LUIS F AVALOS SPECIAL NEEDS TRUST (TRU)...  
NOREEN T FONTAINE ESQ (PET/STE)...NOREEN T FONTAINE

GENERAL INFORMATION:

**Continued from 11/14/17.**

THIS CASE IS SET FOR HEARING ON Petition for Authority to Sell and Purchase Real Property by Successor Trustee, Noreen T. Fontaine ["Petitioner"] of the Luis F. Avalos Special Needs Trust. [PR. C. §17200(b)].

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petition indicates that the property on hand at the end of the third account ending on 08/31/15, consists of monthly annuity payments for life and real property located at 9320 Frankfort Avenue, Fontana, CA ["Frankfort Property"].
2. Petitioner states that the property the property was built in 1952; was purchased in August 2001 for \$128,000 and is currently worth \$320,000; alleges that while the real property is shown to have experienced a 130.7% increased value since 2001, its' physical condition needs attention; as minimal improvements and upgrades have been done.
3. Petitioner believes that it would be advantages to the Trust and ultimately the beneficiary for a sale of the Frankfort property and purchase of a newer one at this time. Petitioner states the goal is to sell the Frankfort real property and purchase a newer property in the City of Perris, via an all cash transaction.
4. The Trustee requests Court authority to sell the property located on 9320 Frankfort Avenue, Fontana, CA and purchase a comparably priced property in San Bernardino or Riverside County.
5. Copies of bank statement as of 07/31/17 and home estimates are affixed to petition.

6. Current bond of \$6,000. Petitioner seeks an increase to bond to \$150,000. Insufficient. Suggest bond increase by \$287,000 for a new bond total in the amount of \$293,000. **JTD. [Supp. 11/14/17 Petitioner accepts a bond of \$293,000.00]**
7. Notice is complete.
8. ~Proposed Order: 11/14/17

RECOMMENDATION:

Court's discretion. \$293,000 bond.

(nb/ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 01/08/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1100815

CASE NAME: LUIS F AVALOS SPECIAL NEEDS TRUST

**SEE ALSO 2**

HEARING:

Accounting Review

COUNSEL:

BANK OF THE WEST (PET)...BURGH, BALIAN & BERGSTEIN  
LUIS F AVALOS SPECIAL NEEDS TRUST (TRU)...  
NOREEN T FONTAINE ESQ (PET/STE)...NOREEN T FONTAINE

GENERAL INFORMATION

Continued from **10/12/17**. Non-appearance by counsel.

**Continued from 11/14/17.**

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. 3<sup>rd</sup> SNT Account by Noreen Fontaine, Successor Trustee, approved on 10/22/15.
2. **Need** 4<sup>th</sup> SNT Account beginning with 09/01/15.

RECOMMENDATION

Inquire status.

(/lc/nb/ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 01/08/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1200050

CASE NAME: ADOLPH ROBERT RIMPAU TRUST

HEARING:

FIFTH Account and Report of VERONICA LANUZA and Petition for allowance of fees filed.

COUNSEL:

JAMES R KOSTOFF (PET)...M DANIEL SAYLOR  
ADOLPH ROBERT RIMPAU TRUST (TRU)...  
VERONICA LANUZA (PET)...M DANIEL SAYLOR

GENERAL INFORMATION

**Continued from 11/27/17.**

THIS CASE IS SET FOR HEARING ON Fifth Account Current and Report of Successor Trustee; Ratifying Acts of Successor Trustee; Allowing Trustee's Fees and Attorney's Fees ; and Decreasing Bond.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period: 07/01/16 to 06/30/17.
2. Assets on hand \$456,255.43 consisting of \$34,553.20 in cash and the balance in securities and real property.
3. Petitioner requests fees of \$4,186.00 billed at \$115/hour for a total of 36.40 hours. Itemized [LF pgs.17-22].
4. Attorney requests fees of \$4,357.50 billed for attorney at \$375/hour and paralegal at \$135/hour for a total of 24.1 hours. Generally Itemized [LF pgs. 23-24].
5. Current bond is \$1,135,000.00. Petitioner requests bond be decreased by \$50,000 for a total new bond of \$1,085,000.00. Appears sufficient. JTD.
6. Notice given.
7. ~Proposed order: 08/23/17

RECOMMENDATION:

Court's discretion. If approved, set hearing re Accounting Review for **01/14/19**.

(ww)



Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 01/08/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1500694

CASE NAME: LINDA MAXINE PETERS

HEARING:

Motion Re: REOPEN PROBATE CASE Filed by Petitioner ERNESTO J  
AVILEZ

COUNSEL:

ERNESTO J AVILEZ (PET)...PRO/PER  
LINDA MAXINE PETERS (DEC)...

Currently under review by Legal Research

LR

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 01/08/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600124

CASE NAME: MTR OF HELGA MARIE HARDERS

HEARING:  
Accounting Review

COUNSEL:  
CEASAR A ORTIZ (PET)...PRO/PER  
HELGA MARIE HARDERS (DEC)...

#### GENERAL INFORMATION

**Continued from 10/23/17. Administrator states the property was lost to foreclosure. Matter is continued for a status report to be filed.**

THIS CASE SET FOR HEARING ON Accounting review/Status.

#### THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Letters of Administration issued to Caesar Ortiz, son, on 08/16/16; full authority, no bond.
2. **Need** final Inventory and Appraisal
3. **Need** accounting or status report.

#### RECOMMENDATION

Inquire status of accounting and Final Inventory and Appraisal.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 01/08/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700595

CASE NAME: THE ELVIRA T. RATHBUN LIVING TRUST

HEARING:

Petition for OF CO-TRUSTEE TO REMOVE ANOTHER CO-TRUSTEE

COUNSEL:

GAIL N GRINDLE (PET)...DONNASUE ORTIZ  
THE ELVIRA T RATHBUN LIVING TRUST (TRU)...

Currently under review by Legal Research.  
(LR)

Notice given. However, need copy of all trust documentation per Local Rule 20-1502 to verify whether notice is complete.

(nb/ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 01/08/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700965

CASE NAME: AALTJE VREDEVELD AKA ALICE VREDEVELD

HEARING:

Hearing re: Petition for Probate, Letters of Testamentary With  
Full Authority Under IAEA..

COUNSEL:

ANDRES J CASTELLON (PET)...FULLERTON LEMANN SCHAEFER & DO  
AALTJE VREDEVELD (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Andres Castellon, grandson

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Will waives bond. The estate consists of \$200,000 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. Petitioner indicates that the original will is lodged with the Salt Lake County Clerk.
3. Declination by named executor is attached.
4. Decedent was a citizen of the Netherlands but left an apartment in Fort Irwin. Court to clarify if decedent owned apartment.
5. ~Proposed Form Order: 09/28/17

#### RECOMMENDATION

Court's discretion re: note 4 and bond. If approved, set Accounting/Status Review for **03/18/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 01/08/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1701044

CASE NAME: MTR OF LEONARD JOHN FILAN

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS OF ADMINISTRATION  
W/WILL ANNEXED W/FULL AUTH TO ADMIN UNDER IAEA

COUNSEL:

LEONARD JOHN FILAN (DEC)...  
RAYCHEL M MILLER (ADM)...THOMAS W DOMINICK

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate of Will for Letters of Administration WWA with Full Authority under IAEA by Raychel Miller, daughter

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petitioner is sole beneficiary and waives bond. Net value of the estate consists of \$180,000 in real property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. ~Proposed Form Order: 10/18/17

#### RECOMMENDATION

RFA. Court's discretion re bond. If approved, set Accounting/Status Review for **03/18/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 01/08/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1701196

CASE NAME: ESTATE OF RUSS STEPHEN GENOVESE

HEARING:

Hearing re: Petition for Letters of Admin. W/ Full Authority  
under IAEA.

COUNSEL:

RICHARD S GENOVESE (PET)...PRO/PER  
RUSS STEPHEN GENOVESE (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full  
Authority under IAEA by Richard Genovese, father

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petitioner alleges that all heirs waive bond; however, **need** mandatory judicial council form DE-142/DE-111 (A-3e) by Tena Penehouse (mother). Net value of the estate consists of **\$360,000.00** in real property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. Section 5 is incomplete as follows:
  - a. As to no spouse whether it is due to divorce, never being married or spouse deceased.
  - b. As to whether decedent was survived by a step or foster child.  
Does court wish to clarify on record or in alternative; need verified supplement.
3. Section 9 indicates that there is 1 page attached; however, no attachments provided. Court to inquire.
4. Final Inventory and Appraisal filed 11/29/17 indicating date of death of 10/12/2013; however petition indicates date of 07/28/17. Court to clarify, or in alternative, need verified supplement.
5. **Need** proof of publication
6. ~Proposed Form Order: 11/29/17

## RECOMMENDATION

Need to clear notes 1 & 5 then Court's discretion re notes 2-4 and bond. If approved, set Accounting/Status Review **03/18/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 01/08/18 TIME: 8:35 DEPT: S36P  
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CASE#: PRO PS1700940

CASE NAME: NADINE DEFFENDERFER REVOCABLE TRUST

HEARING:

Petition for AN ORDER TO CONFIRM VALIDITY OF TRUST CONFIRM  
TRUSTEE ETC

COUNSEL:

KARYN ALEXANDER (PET)...CHRISTOPHER J MURTAGH  
NADINE DEFFENDERFER REVOCABLE TRUST (TRU)...PRO/PER

Currently under review by Legal Research

LR

NOTICE:

Notice given.

(ww)



CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**CONSERVATORSHIPS**

-----  
DATE: 01/08/18      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS1200246

CASE NAME: MILO VERNON ELLINGER

HEARING:

FIRST Account and Report of LISA ZIEMER and Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

MILO VERNON ELLINGER

(CEP)...WALTER T. MOORE

LISA ZIEMER

(CPE)...JENNIFER M DANIEL

JACK B. OSBORN

(PET)...JACK B OSBORN

GENERAL INFORMATION

**Continued from 11/13/17.**

THIS CASE SET FOR HEARING ON 1<sup>st</sup> Account Current and Petition for Allowance of Fees for Successor Conservator Lisa Artinger

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Accounting period 04/09/14 – 01/13/17; however, conservator was appointed, per minute order, on 01/14/13. Question if any assets marshalled from date of appointment of conservator to beginning date of this accounting?
2. Assets on hand \$4,473.70 cash.
3. Current bond \$24,000. Appears adequate.
4. Conservator's fees will be pled in a supplement to this petition.
5. Attorney requests total fees of \$18,073.50 for attorney's time billed at \$325/hour for 46.6 hours of which \$491 is for costs and for paralegal time billed at \$125/hour for 19.5 hours. Itemized [LF pgs. 29-35]. **JTD**
6. Schedule C includes various expenditures to Home Depot, Sandborn's Air Conditioning, Solar Mosaic, Inc, Mountain West, Edison, the Gas Company, Time Warner Cable, auto repairs to Palms Springs Infinity, Window tinting to Edana Window tint and Octavio Martinez, Auto Zone, O'Reillys, and AAA membership. Final Inventory and Appraisal filed 06/04/15 does not indicate Conservatee has a residential home or vehicle. **Need** verified supplement.
7. Additional expenditures to Toys R Us, attorney Heath Baker and payments to credit cards not belonging to Conservatee. **Need** verified supplement.

8. **Need** original Linda Valley Care Center facility statements.
9. **Need** verified supplement indicating start date that conservatee began residing in the residential care facility.
10. **Need** notice to Department of Veterans Affairs, Pr.C. §1461.5.
11. Petitioner indicates Conservatee can maintain and does not require a conservatorship, however, the conservator has filed a newly updated Capacity Declaration [filed 08/21/17] which indicates continued moderate cognitive impairment despite the conservatee's rights to consent to make medical decisions. It is anticipated that the conservatee through his attorney may file a petition to terminate the conservatorship.
12. Proposed order. 10/03/17 Need statement of bond amount.

#### RECOMMENDATION

Need to clear notes 6-10. If approved, set hearing on the next accounting review for **01/14/19** (if one year) or **01/13/20** (if two years). Accounting to be filed 30 days in advance.

(cs/ww)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 01/08/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1300182  
CASE NAME: Gloria D Matthews

HEARING:

THIRD Account and Report of CRAIG S MATTHEWS, RUTH MATTHEWS SMITH and Petition for allowance of fees filed.

COUNSEL:

CRAIG S MATTHEWS	(CPE)...LAYNE A BARTHOLOMEW
RUTH MATTHEWS SMITH	(CPE)...LAYNE A BARTHOLOMEW
GLORIA D MATTHEWS	(CEP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Third Account Current and Report of Co-Conservator, Craig Matthews and Ruth Matthews Smith.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Accounting period 09/12/15 – 09/11/17.
2. Assets on hand: \$120,290.88 consisting of \$101,933.43 in cash and the remainder in securities.
3. Current bond is \$106,000.00. Insufficient. Petitioners request bond be increased to \$215,000.00. Calculated. Appears Ok. [LF pg. 101] **JTD**
4. Petitioners are not requesting fees for this accounting period.
5. Petitioner Ruth Matthews Smith requests for reimbursement of expenses in the amount of \$706.97. Itemized. [LF pg. 97-99] **JTD**
6. Attorney requests fees in the amount of \$1,210.00. Bill at \$100/hour for 12.1 hours of paralegal time. Itemized. [LF, pgs. 91-95]. **JTD**
7. **Notice given.**
8. Proposed Order: 11/22/17; however, accounting period end date doesn't not match accounting.

RECOMMENDATION

Court's determination re: fees and bond. If approved, Court may wish to set the next hearing re Accounting Review for **01/14/19** or a biennial Accounting Review for **01/30/20** per Pr.C.§2620(a). Any accounting to be filed 30 days in advance.

(ww/cs)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 01/08/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700245

CASE NAME: ARNOLD W DURAN

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
INLAND COUNTIES REG CNTR (PET)...LAYNE A BARTHOLOMEW  
VERONICA LANUZA (CPE)...PRO/PER  
ARNOLD W DURAN (CEP)...DONNASUE ORTIZ

GENERAL INFORMATION

Continued from **08/08/17**. Donnasue Ortiz is appointed.

Continued from **10/10/17**. A limited conservatorship is not being requested so an IRC report is not required.

**Continued from 11/13/17 Oral motion made for a temporary conservatorship of the estate. Veronica Lanuza appointed temporary conservator of the estate only.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Inland Regional Center

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Section 3e [LF, p4] reflects estimated value of the property of the estate as \$0.00 and refers to supplemental information form that indicates proceeds are substantial. **Need** verified supplement and/or proper moving papers if information is to be deemed "confidential," as there is no such order as of the review of this matter.
2. Petitioner does not address bond in referenced attachments. **Need** verified supplement clarifying proposed conservatee's annual income and property on hand to determine bond calculation.
3. Proposed conservatee is developmentally disabled. **Need** report of court-appointed counsel, Donnasue Ortiz.
4. Petitioner does not request medical powers; however, item #9 of petition indicates medical treatment [LF pg. 7]. **Need** verified supplement clarifying if medical powers are sought.
5. Capacity Declaration filed 09/25/17.
6. Citation returned served.
7. Court Investigator report filed 08/01/17.

8. ~Proposed Form Order: 06/28/17

**RECOMMENDATION**

Need to clear notes 1-4. If approved, set hearing for Compliance Review for **08/13/18** for the filing of the required documents and hearing re Accounting Review for **03/18/19**. Any accounting to be filed 30 days in advance.

(lh/nb/ww)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 01/08/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700305

CASE NAME: PRESHUS HANNAH CASTORILLO

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
SOPHIA T CASTORILLO (CPE)...PRO/PER  
PRESHUS HANNAH CASTORILLO (CTP)...JENNIFER M DANIEL

GENERAL INFORMATION

**Continued from 09/25/17. Attorney Daniel appointed.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Sophia Castorillo (mother)

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petitioner requests \$0 bond.
2. Petitioner requests estate powers and requests orders under Pr. C. §2591; however, it does not appear proposed conservatee has any income or property. Question need for estate powers?
3. Petition indicates proposed conservatee is receiving or entitled to receive benefits from US Dept of Veteran Affairs, with \$0 estimate. Court to inquire.
4. Proposed conservatee is developmentally disabled; however, attachment 5f is not attached. It appears a limited conservatorship is appropriate.
  - a. As this is not a petition for Limited Conservatorship, Court may wish to appoint counsel and require report for proposed conservatee per Pr.C. §1470. Jennifer Daniel appointed as counsel.
  - b. As this is not a petition for Limited Conservatorship, an IRC report is optional per Pr.C. 1827.5(b). Does court wish to require? JTD
5. Petitioner seeks medical powers. Capacity Declaration filed 08/16/17.
6. Certificate of Completion of the Conservatorship Training Class filed 09/07/17.
7. Ci report filed 09/19/17.
8. Report by court-appointed counsel, Jennifer Daniel filed 10/25/17.
9. **Need** return of Citation
10. Notice of Hearing and Proof of Service filed 10/25/17 as to Inland Regional only allowed 19 days' notice. **Need** 30 days' notice per Pr.C. § 1461.4.

**11. Letter from Inland Regional filed 11/03/17 is requesting a 30 day continuance due to insufficient notice. JTD.**

12. ~Proposed Form Order: 08/16/17

RECOMMENDATION

Need to clear notes 9 & 10 then Court's discretion re note 11 and bond. If approved, set hearing for Compliance Review for **08/13/18** for the filing of the required documents and hearing re Accounting Review for **03/18/19**. Any accounting to be filed 30 days in advance of hearing.

(lh/nb/cs/ww)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 01/08/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700436

CASE NAME: Lola Faye Kelly Woodard

**VACATED AND RESET ONTO 02/07/18.**

HEARING:

Petition for Appointment of Conservator

COUNSEL:

LOLA KELLY HORNE (CPE)...

LOLA FAYE KELLY WOODARD (CEP)...

#### GENERAL INFORMATION

Temporary hearing on **12/06/17** continued to 12/13/17. Walter Moore appointed. Bond required \$50,000.00 Petitioner may appear by CourtCall.

**At temporary hearing on 12/13/17. Attorney Simpson indicates competing petition to be filed. Jeanne Kennedy appointed as GAL. Referred to CI.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Lola Horne, daughter.

#### THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petitioner requests to waive bond as she is the daughter of the proposed conservatee. Estimated value of conservatee's assets is \$100,000 in real property. **JTD**
2. Petitioner did not request 2355 medical powers on page 1; however, section 9 indicates that conservatee lacks capacity. **JTD**
3. Petitioner request other orders as follows: award of care custody and control of conservatee, authorization to make any and all necessary medical, legal and financial decision, insurance changes, any business decision, talk on conservatee's behalf and sign any necessary documents to assist in her medical personal and financial/business issues. **JTD**
4. Section 9b as to religion that relies on prayer is incomplete. Court to inquire.
5. Section 11 as to name and relationship of relatives within the 2<sup>nd</sup> degree is incomplete. **Need** verified supplement as to include Ivory Kelly, son; Angela, Ivy, Issac, Ivan, David, Lola, Ivory (Jr.) Kelly; and Reginald Freeman, grandchildren.
6. Petition indicates related cases CONPS1600058 and FAMVS1702864. **Need** notice of related cases.



7. List of Required Contacts filed 11/29/17; however is incomplete to all relatives within the 2<sup>nd</sup> degree. **Need** completed form to include Ivory Kelly, son; Angela, Ivy, Issac, Ivan, David, Lola, Ivory (Jr.) Kelly; and Reginald Freeman, grandchildren.
8. **Need** Certificate(s) of Completion of the Conservatorship Training Class
9. **Need** Notice of Hearing and proof of service.
10. **Need** bond of \$50,000.00.
11. **Need** Report of Counsel Walter Moore.
12. **Need** Report of GAL Jeanne Kennedy.
13. **Need** CI report
14. Court to see Confidential Screening form.
15. Return of citation with proof of service filed 12/11/17.
16. **Objections by Alice Vinson, granddaughter, filed 12/13/17.**
17. ~Proposed Form Order: 11/29/17

#### RECOMMENDATION

Matter is contested. Need CI report, report of Counsel, report of GAL, and to clear notes 5-13. If approved, set hearing for Compliance Review for **08/13/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

Set hearing re Accounting Review for **03/18/19**. Any accounting to be filed 30 days in advance.

(ww)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 01/08/18 TIME: 9:30 DEPT: S36P  
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CASE#: SC SS3224

CASE NAME: IN THE MATTER OF LAUNA LUGINSKY

HEARING:  
Accounting Review

COUNSEL:  
SYLVIA LUGINSKY (CPE)...BUXBAUM & CHAKMAK  
LAUNA LUGINSKY (CEP)...  
LISSA ANNE MARTINEZ (SC )...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Ex parte petition to dispense with accounting and order for Lissa Martinez, sister, approved on 04/05/16.
2. **Need** Account or waiver of account beginning with 12/01/15.

#### RECOMMENDATION

Inquire status of accounting.

(ww)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **MISC.**

-----  
DATE: 01/08/18 TIME: 10:30 DEPT: S36P  
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CASE#: PRO PS1600650

CASE NAME: DOUGLAS ELROY WAAS

HEARING:

Probate status report filed.

COUNSEL:

PAULINA WAAS (PET)...PETER M BOCHNEWICH  
MARK P LYONS (PET)...PETER M BOCHNEWICH  
DOUGLAS ELROY WAAS (DEC)...

THIS CASE IS SET FOR HEARING ON Status Report.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Letters of Testamentary issued to co-executors Paulina Waas, spouse; Paul Messner, named co-executor and Mark Lyons, step-son, on 08/31/16; full authority, \$820,400 bond.
2. Petitioner requests an additional 12 months to close the estate.
3. Estate is not in a condition to close due to trust matters currently being litigated in a number of cases in the Los Angeles County Superior Court. BP172158 is set for trial in Feb. 2018. Litigation is still active in "Collections Case" ECO66706.
4. Petitioners also indicate that the Final Inventory and Appraisal is delayed due to the litigation but that a preliminary inventory will be filed within approx. 60 days.
5. **Need** Final Inventory and Appraisal.
6. **Need** Notice of Hearing and proof of service in accord with Pr.C. § 12201(b) advising the recipients of the right to petition for an account in accord with Pr.C. § 10950. **This form of notice is mandatory.**
7. No proposed order. Submit order after hearing.

RECOMMENDATION:

Need to clear notes 5 & 6 then Court's discretion. If approved, set next hearing for Accounting Review for **10/08/18**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

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DATE: 01/08/18      TIME: 1:30      DEPT: S36P  
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CASE#: CON PS1500228

## **VACATED**

CASE NAME: CHARLOTTE K KNIGHT-UTTER

HEARING:

Court Trial set for PETITION FOR CONSERVATORSHIP of LINDA K GUYETTE

COUNSEL:

LINDA K GUYETTE	(PET)...MICHAEL C. MADDUX
E JOAN NELMS	(PET)...E. JOAN NELMS
WRETHA KNIGHT	(PET)...FRANK O TETLEY
CHARLOTTE K KNIGHT-UTTER	(CEE)...E JOAN NELMS
CARY KNIGHT	(FRANK O TETLEY)

Settlement reached on 12/14/17.

(ww)

Future hearing dates: 04/03/18 Conservatorship Compliance Review Hearing  
03/06/19 Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

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DATE: 01/08/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS0600139

CASE NAME: IN RE ESTATE OF CHESTER RAY BURNETT

HEARING:

Accounting Review

COUNSEL:

ALVILDA BUSH

(PET)...LENA GHIANNI

CHESTER RAY BURNETT

(DEC)...

RUTH L HENRICKS

(PET)...HARTNELL LAW GROUP

#### GENERAL INFORMATION

Continued from **01/04/16, 02/22/16, 04/05/16, 06/07/16, 08/16/16, 10/18/16, 12/19/16, 03/20/17, 06/12/17, and 08/21/17**

**Continued from 10/30/17. If accounting not filed prior to next hearing the Court will suspend letters of administration, set OSC re: sanctions and notify the Public Administrator.**

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Letters of Administration issued to Ruth Henricks on 03/16/07, full authority, no bond.
2. Seventh status report approved on 06/01/15.
3. Need accounting or next status report.

#### RECOMMENDATION

Inquire status of accounting or status report. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. § 11050 et seq.

(lc/dl/nb/ww/cs)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 01/08/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1300719

CASE NAME: The Martinez Family Trust\*\*MASTER FILE\*\*

HEARING: SECOND Account and Report of CHRISTINA ERICKSON-TAUBE and  
Petition for allowance of fees filed.

COUNSEL:

PAUL MARTINEZ	(PET/PLA)...ROBERT J SPITZ
DAVID MARTINEZ	(PET/PLA)...ROBERT J SPITZ
THE MARTINEZ FAMILY TRUST	(TRU)...
FRANK MARTINEZ	(PLA)...H.G. LONG
CHRISTINA ERICKSON-TAUBE	(PET)...SHERRI L KASTILAHN
ROBERT J SPITZ	(PET)...ROBERT J SPITZ
FRANK MARTINEZ	(STE)...BROWN WHITE & OSBORN
PAUL MARTINEZ SR	(PRO/PER)
FRANK MARTINEZ	(JAMES B CHURCH)
HOSSEIN YAZDANI	(JOHN L BAILEY)
YAZDANI PROPERTIES, LLC	(JOHN L BAILEY)

Waiver of Court Fees and Costs filed by PAUL MARTINEZ SR is GRANTED  
**X-REF SCSS02584 (Matter of Andres Martinez)**

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Second and Final Account and Petition for Allowance of Fees; for Distribution and for Discharge, by Successor Trustee, Christina Erickson-Taube, PPF.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Accounting period 12/01/15 to 06/30/17
2. Assets on hand \$361,199.31 cash.
3. Need financial statement for CDARS account through the end of account period.
4. Bond set at \$350,000. Appears sufficient.
5. Petitioner requests fees of \$7,631.20 billed at various rates not to exceed \$115 per hour. Itemized, hours not summarized [LFpgs 18-25]. JTD
6. Attorney requests fees of \$22,207.50 for 63.45 hours at \$350 per hour. Itemized [LFpgs 26-33]. JTD

7. Petitioner indicates the trust is in a position to settle and distribute pursuant to the two settlement agreements which allows for offsets to two trust beneficiaries.  
[Settlement Agreement dated 07/10/06 under case SCSS02584 [LF,p. 35] and Final Account and Objection to Frank Martinez' accounting wherein the parties reached a tentative settlement and are working on a settlement agreement. ]
8. Notice given.
9. ~Proposed Order:

#### RECOMMENDATION

Need to clear note 3. Court's discretion re fees. If approved, set hearing on the filing of receipts and final discharge for **03/18/19** .

(cs)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 01/08/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1500738

CASE NAME: MTR OF DORIS ANNE SUNDEEN

**SEE ALSO 4**

HEARING: Re: PROBATE STATUS REPORT

COUNSEL:

MARJORIE SUNDEEN HUMPSTEAD	(PET)...H. BROOKS TRAVIS
DORIS ANNE SUNDEEN	(DEC)...
DONALD HEMPSTEAD	(PET)...KATHRYN A FLANIGAN

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Successor Administrator

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Letters of administration issued 09/14/15 to Marjorie Sundeen Hempstead as administrator, full authority, no bond. **Marjorie passed away on 06/02/16.** Successor Letters of administration issued to Donald Hempstead, nephew, 11/08/16, no bond.
2. Petitioner, Donald Hempstead, alleges the estate is not in a condition to be closed as he is unable to provide a successor administrator accounting without an account from the prior administrator. Petitioner files this report in efforts to marshal assets, and seek an order from this Court to compel H. Brooks Travis, attorney for previous administrator, provide an Account and Report for the period of time his client, was appointed administrator in accordance with Pr.C. §10953(b)(c)(d).
3. Petitioner requests the accounting review set for the Administration of Donald Hempstead be continued until attorney H. Brooks Travis' accounting for the Administration of Marjorie Sundeen Hempstead is approved.
4. Notice of Hearing filed 10/27/17; however, need Notice of Hearing and proof of service in accord with Pr.C. § 12201. Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. §10950.
5. **Response and Opposition to Request for Order compelling Attorney H. Brooks Travis to Account and Report filed 12/05/17.**
6. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear note 4. If approved, set next Accounting/Status Review for **08/13/18**.

(cs)

Future Hearing: 1/16/18: Acct Review **for Donald Hempstead, successor administrator**



Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 01/08/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1500738

CASE NAME: MTR OF DORIS ANNE SUNDEEN

**SEE ALSO 3**

HEARING: Accounting Review

COUNSEL:

MARJORIE SUNDEEN HUMPSTEAD	(PET)...H. BROOKS TRAVIS
DORIS ANNE SUNDEEN	(DEC)...
DONALD HEMPSTEAD	(PET)...KATHRYN A FLANIGAN

GENERAL INFORMATION:

Continued from **11/21/16** to file accounting (Marjorie Humpstead).

Continued from **05/22/17**. No appearances. Marjorie Humpstead and/or Counsel are ordered to be present at next hearing if accounting not filed.

Continued from **07/31/17**. Counsel represents he has previously filed a Substitution of attorney. Counsel is to file a declaration/notice form and provide contact information for Donald Hempstead and counsel.

Continued from **08/14/17**. No appearance. Donald Hempstead and/or Counsel are ordered to be present if accounting not filed.

**Continued from 10/30/17 Marjorie Sundeen Humpstead and/or counsel is ordered to be present at the next hearing if accounting not filed.**

THIS CASE IS SET FOR HEARING ON Accounting Review (Marjorie Hempstead)

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Letters of administration issued 09/14/15 to Marjorie Sundeen Hempstead as administrator, full authority, no bond. **Marjorie passed away on 06/02/16.** Successor Letters of administration issued to Donald Hempstead, nephew, on 11/08/16, no bond.
2. **Need** Final Inventory and Appraisal.
3. **Need Accounting.**

RECOMMENDATION:

Inquire status of accounting and Final Inventory and Appraisal. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. § 11050 et seq.

(nb/lh/ww/nb/cs)

Future Hearing 01/16/18: Acct Review **for Donald Hempstead, successor administrator**

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 01/08/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600608

CASE NAME: CREIG ALLEN SCHMALTZ

HEARING:  
Accounting Review

COUNSEL:  
SHELLEY LORENE SCHMALTZ (PET)...PRO/PER  
CREIG ALLEN SCHMALTZ (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting Review/Status

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Letters of Administration issued to Shelley Schmaltz, spouse, on 10/31/16 full authority, no bond.
2. Need Final Inventory and Appraisal.
3. Need accounting or status report.

RECOMMENDATION:  
Inquire status  
(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 01/08/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600767

CASE NAME: LENA L MOSSUTO

HEARING:  
Accounting Review

COUNSEL:  
CAROL A HOWARD (PET)...TAYLOR, SIMONSON & WINTER LLP  
LENA L MOSSUTO (DEC)...  
SURETEC INSURANCE CO (TP )...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting Review/Status

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Letters Testamentary issued to Carol Howard, named executrix, on 11/28/16 full authority, \$75,000 bond
2. Final Inventory and Appraisal filed 03/17/17.
3. Need accounting or status report.

RECOMMENDATION:  
Inquire status  
(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 01/08/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600791

CASE NAME: GRETA FRANCES RANEY

**VACATED**

HEARING:

Accounting Review

COUNSEL:

SHELLEY CURRIE

(PET)...PRO/PER

GRETA FANCES RANEY

(DEC)...

**DO NOT ASSIGN TO DEPT. S35**

VACATE – Accounting filed 09/01/17.

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 01/08/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601238

CASE NAME: MTR OF TIMOTHY J TEICH

HEARING: FIRST AND FINAL Account and Report of CHAD PETERSON, JAMIE PETERSON and Petition for allowance of fees filed.

COUNSEL:

CHAD PETERSON	(PET)...MICHAEL W BROWN
JAMIE PETERSON	(PET)...MICHAEL W BROWN
TIMOTHY J TEICH	(DEC)...
SURETEC INSURACNE CO	(TP )...

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON First and Final Waiver of Account; Petition for Allowance of Fees; and for Final Distribution by Chad Peterson and Jamie Peterson, Co-executors/C--Trustees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Chad Peterson and Jamie Peterson sole beneficiaries waive requirement of an accounting and receive notice of proposed action.
2. Account period indicated as 10/20/16 – 09/02/17
3. Assets on hand \$342,296.42 consisting of cash.
4. Petitioners waive statutory fees.
5. Attorney request fees in the amount of \$12,979.94. Calculated.
6. Petitioners seek reserves in the amount of \$1,000.
7. Bond set at \$350,885.00
8. ~Proposed order: 09/18/17

RECOMMENDATION:

Court's discretion. If approved, set hearing for Final Discharge and filing of receipts for **01/14/19**.

(cs)

Future Hearing: 5/03/18: Accounting Review

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 01/08/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700379

**VACATED**

CASE NAME: MILDRED MOUNGER

**SEE ALSO 10**

HEARING: Re: RECEIPT OF ORDER

COUNSEL:

DEBRA JORNS	(PET)...ALLEN LAW CORP
MILDRED MOUNGER	(DEC)...
RANDALL MOUNGER	(PET)...JAMES G ALLEN

**VACATE - Order to Determine Succession to Real Property received and signed 11/01/17.**

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 01/08/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700379

CASE NAME: MILDRED MOUNGER

**SEE ALSO 9**

HEARING:

Motion Re: FOR JOINDER Filed by Petitioner RANDALL MOUNGER

COUNSEL:

DEBRA JORNS	(PET)...ALLEN LAW CORP
MILDRED MOUNGER	(DEC)...
RANDALL MOUNGER	(PET)...JAMES G ALLEN

GENERAL INFORMATION:

**Continued from 10/30/17 Motion for joinder granted**

THIS CASE SET FOR HEARING ON For Joinder Filed By Petitioner Randall Mounger

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petitioner, Randall Mounger, requested that the Court add moving party's name to claims set forth in the Petition to Determine Succession to Real Property instead of filing an amended petition.
2. Motion was granted on 10/30/17 and a corrected Order granting motion for Joinder was entered 11/01/17. Order Determining Succession to Real Property also granted and entered 11/01/17.

RECOMMENDATION:

None

(cs)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 01/08/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700557

CASE NAME: LUPE KING

HEARING: Petition for LETTERS OF ADMINISTRATION WITH FULL IAEA

COUNSEL:

LOURDES M KING (PET)...PRO/PER  
LUPE KING (DEC)...

GENERAL INFORMATION

Continued from **08/21/17** to clear notes.

**Continued from 10/30/17 at request of Court to clear notes. Bond of \$75,000 required**

THIS CASE SET FOR HEARING ON **Amended** Petition #2 [filed 12/08/17] for Letters of Testamentary w/ FULL IAEA by Lourdes King, daughter/executrix

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petitioner filed Amended petition in the form of supplement clarifying powers requested and adding all AKA's to petition
2. Will waives bond and all beneficiaries waive bond. The estate consists of \$150,000 in real property. Per minute order of 10/30/17 bond of \$75,000 required.
3. Declaration from named executor, Faustino King, filed 08/21/17 declines to act and nominates Lourdes King, second named executor in decedent's will.
4. ~Proposed Form Order: 12/08/17

RECOMMENDATION

RFA Court's discretion re note bond. If approved, set Accounting/Status Review for **03/18/19**. Any accounting to be filed 30 days in advance Local Rule 20-901. Note requirements of local rule 20-908.

(ww/nb/lh/cs)



CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 01/08/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700787

CASE NAME: DOLORES T. COPELAND

HEARING:

Hearing re: Petition for Probate, Letters of Testamentary With Full Authority Under IAEA..

COUNSEL:

BRUCE EDWARD COPELAND (PET)...MARIVEL M ZIALCITA  
DOLORES T. COPELAND (DEC)...  
TRUST AND ESTATE SEARCH (TP )...DAVID C TURPIN

GENERAL INFORMATION:

**Continued from 10/30/17 at request of Court to clear notes.**

THIS CASE IS SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Bruce E. Copeland, son/executor

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petitioner requests \$392,150 bond. Appears sufficient.
2. Caption of petition does not include all AKAs of decedent as indicated in holographic will. [Petition, 08/04/17, LFpg6]. Does court wish to require amended Petition. JTD
3. Need proof of holographic instrument, [form DE-135].
4. Proof of Publication filed 08/23/17 does not include all AKAs of decedent. JTD
5. ~Proposed form Order: 08/04/17

RECOMMENDATION:

Need to clear notes 3. Court's discretion re bond and notes 2 & 4. If approved, set future hearing for Accounting/Status Review on **03/18/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh/cs)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 01/08/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700888

CASE NAME: MOHAMMAD ASIF

HEARING:

Hearing re: Petition for Letters of Admin. W/ Full Authority  
under IAEA.

COUNSEL:

MOHAMMAD HARRIS BIN ASIF (PET)...MICHAEL C MADDUX  
MOHAMMAD ASIF (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full  
authority under IAEA by Mohammad Asif, son

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. All heirs waive bond. Net estate value is \$137,286 with \$35,000 in personal  
property. The court may for good cause require that a bond be given, either before  
or after issuance of letters. (Prob. Code §8481(b)).
2. Need verified supplement with correct total value of estate.
3. It appears that surviving spouse has priority of Appointment per Pr.C. §8461. Need  
declination/nomination by spouse.
4. ~Proposed Form Order: 09/18/17

RECOMMENDATION

Need to clear notes 2 and 3. Court's discretion re bond. If approved, set  
Accounting/Status Review for **03/18/19**. Any accounting to be filed 30 days in advance  
local rule 20-901. Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 01/08/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1701117

CASE NAME: ESTATE OF WILLIAM PATRICK MAHONEY

HEARING:

Hearing re: Petition for Letters of Admin. W/ Full Authority  
under IAEA.

COUNSEL:

SEAN P MAHONEY (PET)...FULLERTON LEMANN SCHAEFER & DO  
WILLIAM PATRICK MAHONEY (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full  
authority under IAEA by Sean Mahoney, nephew

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. All heirs waive bond. Estate value is \$200,000 with \$5,000 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code §8481(b)).
2. Nomination by brother filed.
3. ~Proposed Form Order: 11/28/17

#### RECOMMENDATION

RFA Court's discretion re bond. If approved, set Accounting/Status Review for **03/18/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 01/08/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1701187

CASE NAME: MTR OF LLOYD LESTER BRYANT

HEARING: Hearing re: Petition for Letters of Admin. W/ Full Authority under IAEA.

COUNSEL:

LARRY BRYANT (PET)...PRO/PER  
LLOYD LESTER BRYANT (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Larry Bryant, son

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petition indicates the will of decedent was completed in 1984. The original was held by Law Offices of Etchason, Davidson, and Liesch which no longer exists and attorney has died. Petitioner has no idea where the original will is. When a will is lost and was last in the testator's possession, it is presumed that the testator destroyed the will with the intent to revoke it. Pr. C. § 6124. This presumption affects the burden of producing evidence and unless petitioner can overcome the presumption, no valid will exists. Does Court wish to find the requirements met and probate the lost will? JTD.
2. Will waives bond. Estate value is \$237,845.00 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code, § 8481(b)).
3. It is unclear as to powers sought in petition. Caption indicates powers sought are for lost will and for letters of administration with will annexed as well as powers for letters of administration. Section 2(b)(3) requests to be appointed Administrator; however, petitioner is a named executor. Need verified supplement.
4. Petition does not include all AKA's of decedent. Need verified supplement.
5. Petition section 3(g) indicates proposed personal representative is a nominee of person entitled to letters; however, no nominations are attached. Need same.
6. Need Declination by named co-executors: Ivy Stevens and Barry Bryant.
7. Question if Ivy Stevens is the same person as "Ivy K. Bryant, daughter" named in section 8 of petition?
8. Section 8 lists Robbyn Webster and Barry Bryant; however, no relationship to decedent indicated. Need verified supplement.

9. Notice of Petition to Administer Estate with proof of service filed 11/30/17 is incomplete as to decedent's full name and item #4 as to will admitted for probate. Need corrected Notice and Proof of Service.
10. Need proof of publication.
11. ~Proposed Form Order: 11/28/17

#### RECOMMENDATION

Need to clear notes 2-10. Court's discretion re bond. If approved, set Accounting/Status Review for **03/18/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 01/08/18 TIME: 8:30 DEPT: S37P  
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CASE#: VG VS02118

CASE NAME: SPECIAL NEEDS TRUST OF MAX WINN

HEARING:

SECOND Account and Report of JOHN W WINN and Petition for allowance of fees filed.

COUNSEL:

JOHN W WINN	(PET/GE)...J. TERRENCE MOYNIHAN
MAX MICHAEL WINN	(MIN)...MITCHELL I ROTH
MADISON PICABO WINN	(MIN)...

GENERAL INFORMATION:

Father, Michael Winn, passed away on 06/26/17.

**Continued from 09/11/17 at request of counsel to file amended I & A. Attorney Roth to file supplement report re sale of shares. Court approves caretaker fees. Court notes Social Security benefits for Max will be reinstated in 2018. Court recommends Social Security be contacted re survivors payments. Court orders case be changed to Special Needs Trust of Max Winn.**

THIS CASE IS SET FOR HEARING ON Second Account Current and Petition for Fees by Trustee, John W. Winn for the SNT

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Accounting period 03/01/16 to 03/31/17.
2. Assets on Hand \$128,537.99 consisting of \$56,537.99 in cash and remaining in stock ownership in a closely-held corporation with Russ Davis.
3. Petitioner requests fees of \$300.00 for professional services rendered to the trust, and the trust beneficiary. Generally described. JTD.
4. Attorney requests fees of \$4,515.00. Billed at \$350/hour for attorney's time. Itemized [LF, pgs. 18-19]. JTD.
5. Current bond of \$206,750.00. Petitioner requests bond reduction per **Supp. filed 09/06/17 to the amount of \$143,000.00. appears sufficient.**
6. **Corrected Inventory and Appraisal filed 09/11/17**
7. Disbursement – Schedule C [LF, p. 15] includes mail and copy fees totaling \$38.77 which are normally considered overhead per Local Rule 20-1311(d). **Supp. filed 09/06/17 indicate fees are for milling costs in corresponding with Russ Davis,**

**Inc. incurred on behalf of trustee and an outstanding costs incurred by the attorney for the trustee falling outside of the normal overhead costs.**

- 8. Supplement filed 09/06/17 indicates current plans to establish a conservatorship of the person of Max Winn in Riverside County.**
9. Petition indicates beneficiary resides in Lake Elsinore, Riverside County with Tera Winn, caretaker. Trustee resides in West Covina, Los Angeles County. **Suggest Court transfer case to Los Angeles County. If so, court to set control date. JTD.**
10. Notice given.
11. Need Report attorney Mitchell Roth.
12. No proposed order. 09/06/17

**RECOMMENDATION:**

Need Report of Mitchell Roth, then Court's discretion re fees and transfer. If matter transferred, Court to set control date.

(cs)







CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**CONSERVATORSHIPS**

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DATE: 01/08/18      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS0800137

CASE NAME: JOE M. TOLLEY SR.

HEARING: Accounting Review

COUNSEL:

THOMAS V. TOLLEY	(PCR)...
JOE M. TOLLEY SR	(PCE/CEP)...DONNASUE ORTIZ
MICHAEL D TOLLEY	(PET)...PRO/PER
DONNA TOLEY	(CPE)...BRIAN C MILES
RUTH M. TOLLEY	(PET/OBJ)...STEVENSON LAW OFFICE
JOHN L GORDON esq	(PET)...DRISKELL & GORDON
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
DONNA TOLLEY	(PET)...MARIELLEN ROSS
MARIELLEN ROSS	(PET)...MARIELLEN ROSS
CHRISTOPHER SUTTON	(PRO/PER)
ROBERT L KERN	(ROBERT L KERN)
PATRICK B WRIGHT	(PRO/PER)

**XREF: CONPS0900199** RUTHIE MAE TOLLEY; **PROPS0900741** JOE M TOLLEY, SR & RUTH M TOLLEY

GENERAL INFORMATION

Continued from 09/14/16,12/12/16, 03/13/17, 06/05/17 and **09/11/17**

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. On 3/28/16 Court approved the 1<sup>st</sup> Account Current of Donna Tolley, daughter/conservator of person and estate, for the period ending 4/30/14.
  - a. Need Order Settling 1<sup>st</sup> Account Current.
2. Need 2<sup>nd</sup> accounting beginning with 05/01/14.

RECOMMENDATION:

Inquire status of Order settling 1<sup>st</sup> account current and 2<sup>nd</sup> accounting. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(sa/nb/ww/cs)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 01/08/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1600198

CASE NAME: MTR OF CARLA JAILENE GARCIA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of AURELIO GARCIA GONZALEZ

COUNSEL:

AURELIO GARCIA GONZALEZ (CP)...PRO/PER  
MARLENE GARCIA (CP)...PRO/PER  
CARLA JAILENE GARCIA (CTP)...CRAIG M PARKER

GENERAL INFORMATION

**Continued from 10/16/17 at request of counsel to clear probate notes.**

THIS CASE SET FOR HEARING ON Compliance Review.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Aurelio Garcia Gonzalez & Marlene Garcia, parents, appointed limited conservator of the person only on 03/06/17.
2. Determination of Conservatee's Appropriate Level of Care form GC-355 and Care Plan in accord with Pr.C.§2352.5 filed 04/18/17.
3. Notification of Conservatee's rights per Pr.C.§1830(c) filed 10/19/17

RECOMMENDATION

None  
(ww/cs)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 01/08/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700439

CASE NAME: MTR OF STEVEN SCHAEFER  
HEARING: Petition for Appointment of Conservator

COUNSEL:

DAWN SCHAEFER (CP)...PRO/PER  
STEVEN SCHAEFER (CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Dawn Schaefer, mother

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract, make decisions re education, medical, psychological services, social and vocational opportunities. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Section 5a indicates minor will be an adult; however, date is not provided. Need verified supplement.
4. Petition is not signed or dated. Need corrected petition.
5. Petitioner seeks medical powers. Capacity Declaration filed 12/01/17; however, section A re hearing date is incomplete; section 5 re ability to attend court hearing is incomplete and form is not dated at signature line on page 1. Need completed form.
6. Confidential Conservator Screening form provides information for minor at section 1. Need information for proposed conservator. Need corrected form.
7. Proposed conservatee is developmentally disabled. Need Report of Mark Flory, Court appointment counsel.
8. Proposed conservatee is developmentally disabled. Need IRC report.
9. Need Certificate of Completion of the Conservatorship Training Class.
10. Need Court Investigator report.
11. Return of Citation with Proof of Service filed 12/15/17
12. ~Proposed Form Order: 12/01/17

RECOMMENDATION

Need to clear notes 3-10. If approved, set hearing for Compliance Review for **03/18/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5. (cs)

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Revised second check notes post two court days prior to the hearing. Documents filed at least seven days prior to the hearing will be included while later documents may be delivered to the courtroom for consideration at the judge's discretion. ♦ Examiners can be contacted at [ProbateNotes@sb-court.org](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - no legal or procedural advice will be given.

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 01/08/18 TIME: 9:30 DEPT: S37P  
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CASE#: SC SS01638

CASE NAME: MTR OF RICHARD FENTON

HEARING: Petition to dispense with requirement of final Account and Report of INLAND COUNTIES REGIONAL CENTER INC and Petition for allowance of fees filed.

COUNSEL:

INLAND COUNTIES REG CNTR (CE)...STEVEN K BECKETT  
RICHARD FENTON (CTE/CEP)...HARTNELL HORSPPOOL & FOX

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Petition to Dispense with Requirements of Final Accounting; for Allowance of Fees; Authority to Withhold Reserve; Terminate Trust and Discharge Trustee, by Inland Counties, Inc. [Trustee/Petitioner]

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

3. Petitioner alleges Court order of 11/08/10 approved future trust accountings be dispensed with as long as trust estate continued to meet requirements which allows a court to waive accountings where the amount of the trust is \$20,000.00 or less, CRC. 7.903(d).
4. Accounting period 08/31/10 to 09/30/17.
5. Assets on hand \$3,996.07 50 (cash held in Master Trust)
6. Petitioner alleges that due to the size of the estate, the need for the trust has ended and the trust should be terminated. Petitioner requests to dispense with the requirements of a final account. JTD
7. Petitioner requests statutory fees in the amount of \$2,875.00 which have already been taken during this accounting period. [LF, p. 13].
8. Petitioner request authority to allow Master Trust of California to take the trustee fees that were accrued but unpaid in the amount of \$3,937.50, plus a prorated trust termination fee in the amount of \$312.50, for a total of \$4,250.00. JTD
9. Attorney requests fees of \$1,160.00, itemized, [Dec. filed 11/07/17, LF, p. 5].J TD
10. Petitioner requests authority to withhold \$500.00 as a reserve.
11. As the remaining balance in trust is insufficient to pay trustee fees, Petitioner seeks the balance of the funds held in trust after withholding reserves, paying costs, and attorney fees as well as any unused portion of reserves to be delivered to Master Trust of California for payment towards the balance of trustee fees without further order of court. JTD

12. Inland Counties Regional Center Report filed 11/07/17 in support of dispensing with requirement of final accounting.
13. Notice given.
14. ~Proposed Order: 11/17/17

**RECOMMENDATION:**

Court's discretion. If approved, set next hearing for receipts and final discharge on **01/14/19**  
(cs)

Superior Court of Calif, County of San Bernardino

Page: 22 add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 01/08/18      TIME: 9:30      DEPT: S37P  
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CASE#: VC VS249

CASE NAME: IN THE MATTER OF JOHN P JOSEPH

HEARING: Re: COURT INVESTIGATOR REPORT

COUNSEL:

JOHN PAUL JOSEPH      (CEE)...JENNIFER M DANIEL  
DOROTHY JOSEPH      (CP)...

GENERAL INFORMATION:

**Continued from 12/18/17 Ms. Daniel requests clarification as to what the court wants her to report on. Counsel reports her client is living in Apple Valley with his brother Michael and that Michael will not pursue a conservatorship since his mother named him successor conservator in her will. As there is no conservatorship currently in place the Court appoints the Public Guardian as temporary conservator of the person and estate of John Joseph. Public Guardian is ordered to file a petition and to conduct initial investigation in this matter. Public Guardian to prepare order and letters of temporary conservatorship.**

THIS CASE SET FOR HEARING ON Court Investigator Report

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Matter continued from 11/16/17, wherein after review of CI report filed 11/06/17, Court appointed Jennifer Daniel as counsel for conservatee, John Paul Joseph.
2. Need Petition for Conservatorship of John P. Joseph by Public Guardian.

RECOMMENDATION:

Inquire status of report. Court's discretion.

(cs)