



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 01/10/18

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.

12/18/17lh; 01/04/18

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PROBATE

DATE: 01/10/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400042

CASE NAME: Carolyn Jacobson

SEE ALSO 2

HEARING:

Hearing Re: Petition for ORDERS TO DETERMINE: 1 INTEREST, ETC

COUNSEL:

JULIE STEWART (PET)...DUANE P BOOTH
CAROLYN JACOBSON (DEC)...
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP)...
JONI JACOBSON (LAW OFFICES OF TIMOTHY L MCCAN)
KATHERINE HALL (PRO/PER)
AJC TRUE GRIT LLC
BAKER P.M.J.,L.P.
PROJECT PROPERTY NUMBER FIVE

XREF: CIVBS1200309 ACJ TRUE GRIT-V-SCOTT MARTIN, ET AL

Currently under review by legal research.

(lh)

Future Hearings: 2/13/18-2/16/18: Court Trial 3/12/18: Motion Re: Special Demurrer by Re/Def
Baker to Fifth Cause of Action for "Quiet Title:

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

DATE: 01/10/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400042

CASE NAME: Carolyn Jacobson

SEE ALSO 1

HEARING:

Accounting Review

COUNSEL:

JULIE STEWART (PET)...DUANE P BOOTH
CAROLYN JACOBSON (DEC)...
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP)...
JONI JACOBSON (LAW OFFICES OF TIMOTHY L MCCAN)
KATHERINE HALL (PRO/PER)
AJC TRUE GRIT LLC
BAKER P.M.J.,L.P.
PROJECT PROPERTY NUMBER FIVE

CCP 170.6 filed 12/11/17 as to Judge Reichert.

XREF: PROPS1300285, (Robert Lyle Lee) CIVBS1200309 (ACJ True Grit v Scott Martin etal)

GENERAL INFORMATION:

Continued from **9/22/15, 12/2/15, 01/20/16, 04/19/16, 06/14/16, 09/08/16, 11/09/16, 02/09/17 and 03/29/17.** Waiting for the sale of 8 properties.

Continued from **06/07/17.** Attorney Timothy McCandless indicates that his clients are ready to provide documentation regarding the accounting today; a copies to be provided to Attorney Duane Booth today. Court noted that the parties cited to appear today are to be present in court on June 23, 2017 at in S35 to provide testimony regarding accounting as specified on Citations. Client of Christopher Johnson ordered to be appear at next hearing date of June 23, 2017 in S35.

Continued from 06/29/17.

THIS CASE IS SET FOR HEARING ON accounting/status review

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

1. Letters of Administration with Will Annexed issued to Julie Stewart, daughter, 10/28/14, no bond.

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 for clarification of the notes only - no legal or procedural advice will be given.

2. Partial Inventory and Appraisal filed. Need final inventory & appraisal.
3. Need an accounting or status report.

RECOMMENDATION:

Inquire status.

(sa/nb/lc/lh/lc/nb/lc/lh)

Future Hearings: 2/13/18-2/16/18: Court Trial 3/12/18: Motion Re: Special Demurrer by Re/Def Baker to Fifth Cause of Action for "Quiet Title:

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500082

CASE NAME: MTR OF TERESA L FLECKENSTEIN

SEE ALSO 4

HEARING:

Hearing Re: OSC Re:Settlement

COUNSEL:

TIMOTHY WAYNE FLECKENSTEIN	(PET)...BROCK, MARTIN & VOORHEES
TERESA L FLECKENSTEIN	(DEC)...
KATHLEEN HEAD	(DEF)...DAVID LIVINGSTONE TAUB
BRYAN M TURNER	(DAVID LIVINGSTONE TAUB)

XREF: GARRS1300022 *TANNER WAYNE FLECKENSTEIN*

FAMRS1301184 *KATHLEEN M HEAD -N- TIMOTHY W FLECKENSTEIN*

GENERAL INFORMATION

Continued from 11/08/17. Counsel requested to vacate trial date and reset motion re summary judgment. Notice to be given by David Livingstone Taub.

THIS CASE IS SET FOR HEARING ON OSC Re: Settlement

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

1. Matter set on 09/27/17, wherein, Counsel informed Court that all parties have come to a settlement. Attorney Voorhees informed Court that she will be filing a formal notice of settlement.

RECOMMENDATION

Inquire status.

(lh)

Future Hearings: 2/28/18: Petition for Determination that Personal Property & Real Property be Found to Belong to the Estate, Readiness Calendar, Motion Re: Summary Judgment/Adjudication
3/19/18-3/23/18: Court Trial

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

DATE: 01/10/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500082

CASE NAME: MTR OF TERESA L FLECKENSTEIN

SEE ALSO 3

HEARING:

Accounting Review

COUNSEL:

TIMOTHY WAYNE FLECKENSTEIN	(PET)...BROCK, MARTIN & VOORHEES
TERESA L FLECKENSTEIN	(DEC)...
KATHLEEN HEAD	(DEF)...DAVID LIVINGSTONE TAUB
BRYAN M TURNER	(DAVID LIVINGSTONE TAUB)

XREF: GARRS1300022 TANNER WAYNE FLECKENSTEIN

FAMRS1301184 KATHLEEN M HEAD -N- TIMOTHY W FLECKENSTEIN

GENERAL INFORMATION:

Continued from 7/13/16, 09/21/16, 11/30/16, 02/01/17, 04/19/17, 06/28/17 and 09/27/17.

THIS CASE IS SET FOR HEARING ON Accounting/Status Review

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

1. Letters of Administration issued to Timothy Fleckenstein, spouse, on 4/27/15, \$20,000 bond.
2. **Need** final inventory & appraisal.
3. **Need** an accounting or status report.

RECOMMENDATION:

Need to clear notes 2-3.

(sa/lc/ww/lh)

Future Hearings: 2/28/18: Petition for Determination that Personal Property & Real Property be Found Belonging to the Estate etc, Readiness Calendar, 3/19/18-3/23/18: Court Trial.

Future Hearings: 2/28/18: Petition for Determination that Personal Property & Real Property be Found to Belong to the Estate, Readiness Calendar, Motion Re: Summary Judgment/Adjudication 3/19/18-3/23/18: Court Trial

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

DATE: 01/10/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500263

CASE NAME: OLGA ARGENTINA RODRIGUEZ

HEARING:

FIRST AND FINAL Account and Report of PATRICIA PORTILLO and
Petition for allowance of fees filed.

COUNSEL:

PATRICIA PORTILLO (PET)...MCCLELLAN & WILSON
OLGA ARGENTINA RODRIGUEZ (DEC)...
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by
Patricia Portillo, administrator

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

1. Assets on hand: \$845,000, real property only.
2. Administrator Patricia Portillo waives statutory fees.
3. Statutory attorney fees of \$19,900 requested. Calculated.
 - a. Petitioner requests attorneys' fees to be divided: \$25% at **\$4,975 to Tyler Brown** of Brown & Brown, and 75% at **\$14,925 to Shawn Patterson** of McClellan, Wilson and Patterson. Fees to be paid by heirs outside of probate. **Question if there is a fee agreement between attorneys for split fees? Need verified supplement.**
4. **Need** verified supplement which includes address of Yader Rodriguez, grandson, receiving 1/3 of real property.
5. **Withdrawal of Request for Special Notice by FTB filed 10/10/17. However, need withdrawal of creditor's claim of \$403.69 by FTB.**
6. Proposed order submitted 10/20/17 is missing addresses of distributees receiving real property.

RECOMMENDATION:

Need to clear notes 3-5, then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **01/06/19**.

(lh)

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 for clarification of the notes only - no legal or procedural advice will be given.

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

DATE: 01/10/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500461

CASE NAME: Deborha Thompson

HEARING:

FIRST AND FINAL Account and Report of ANTHONY DURAN and Petition
for allowance of fees filed.

COUNSEL:

ANTHONY DURAN (PET)...LAW OFFICES OF JULIE D. WEINER
DEBORHA THOMPSON (DEC)...
MATTHEW E SHEASBY (PET)...CKB VIENNA, LLP

Waiver of Court Fees and Costs filed by ANTHONY DURAN is GRANTED
TOTAL FEES WAIVED TO DATE: \$1685.00

XREF: FAMSS1404541 *DEBBIE THOMPSON -N- MATTHEW THOMPSON*

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by
Anthony Duran, administrator

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

1. Assets on hand: \$105,523.80, of which \$103,723.80 is cash and remaining in tangible property.
2. Statutory attorney fees to attorney Julia D Wiener in the reduced amount of \$2,500 requested. Calculated.
3. Petitioner requests to pay approved creditors' claims: IRS claim of \$6,658.67; FTB claim of \$99.67; and Matthew Thompson's claim of \$15,500 upon distribution. **JTD**
4. Petitioner Anthony Duran requests pay **\$20,000** to Attorney Matthew Sheasby previously approved by Court on 08/31/16 upon distribution.
5. Petitioner Anthony Duran requests extraordinary fees in the amount of **\$14,098.45** to be paid to Kendall & Ghikas, LLP, for representation in divorce proceedings prior to death of decedent Deborah Thompson. Supporting invoice dated 07/15/16 is attached; however, the attached itemization of services only accounts for \$9,777.77 of requested fees. [Acct, 09/27/17, LFpgs72-78]. **Does**

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 for clarification of the notes only - no legal or procedural advice will be given.

Court wish to require a creditor's claim to be filed by Kendall & Ghikas, LLP? JTD

6. Notice of Hearing and Proof of Service filed 09/27/17 has wrong hearing date. **Need Notice of Hearing with correct hearing date and proof of service.**
7. **Cash assets are held in blocked account in lieu of bond; however, petitioner does not request Court to unblock account. Need verified supplement.**
8. **Does Court wish to reconsider waiver of filing fee? JTD**
9. No proposed order submitted. Submit after hearing.

RECOMMENDATION:

Need to clear notes 6-7, then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **01/16/19**.

(lh)

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

DATE: 01/10/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500701

CASE NAME: FRANK PELLEGRINO JR

SEE ALSO 7A

HEARING:

FIRST AMENDED Account and Report of DORIS NEUHAUS and Petition
for allowance of fees filed.

COUNSEL:

FRANK PELLEGRINO	(PET)...PRO/PER
FRANK PELLEGRINO JR	(DEC)...
MARY LOUISE PELLEGRINO	(PET)...PRICE LAW FIRM, APC
DORIS NEUHAUS	(PET/OBJ)...J PATRICK RAGAN

Waiver of Court Fees and Costs filed by FRANK PELLEGRINO is GRANTED
Waiver of Court Fees and Costs filed by MARY LOUISE PELLEGRINO is GRANTED
Waiver of Court Fees and Costs filed by DORIS NEUHAUS is GRANTED
TOTAL FEES WAIVED TO DATE: \$3995.00

XREF: FAMSS1703685 MARY L PELLEGRINO -N- FRANK PELLEGRINO

GENERAL INFORMATION

Continued from 08/30/17. Court orders Doris Neuhaus to serve and file a complete accounting by 4:00pm on 12/11/17.

THIS CASE SET FOR HEARING ON 1st Amended Trust Account and Report by Doris Neuhaus, Trustee.

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

1. Assets on hand \$5,325 which consists of 2 forklifts, racks, samples and inventory.
2. Accounting period 01/01/15 – 06/08/15. On 08/10/15 petitioner **was ordered to file an accounting from the date of death [06/08/15] forward**. The accounting period appears to be prior to death. Need corrected accounting.
3. The accounting does not appear to properly comply with Pr.C.§16063 and Pr.C.§1060 et. seq.
 - a. Need a proper summary of account and additional accounting schedules under Pr.C. § 1063 [liabilities etc].

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 for clarification of the notes only - no legal or procedural advice will be given.

- b. Beginning assets do not coincide with any assets listed in the report [Acct. 05/10/17 LFpg3].
4. Need notice of hearing and proof of service.
5. **Objections and response filed by Mary Pellegrino on 06/29/17.** Proof of Service filed 08/21/17.
6. **Matter appears moot as it is superseded by Second Amended Report and Accounting of Doris Neuhaus, trustee, filed on 12/11/17.**

RECOMMENDATION

Matter is moot.

Need to clear notes 2-4.

(lc/lh)

Future Hearings: 3/07/18: Readiness Calendar, 3/20/18: 2nd Amended Account & Report, 3/26/18: Court Trial, Status Conference, Petition for Verified Petition for Judgment on Creditor's Claim/Enforcement of Judgment, 3/27/18-3/29/18: Court Trial

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

DATE: 01/10/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500701

CASE NAME: FRANK PELLEGRINO JR

SEE ALSO 7

HEARING:

Application to Increase Bond

COUNSEL:

FRANK PELLEGRINO	(PET)...PRO/PER
FRANK PELLEGRINO JR	(DEC)...
MARY LOUISE PELLEGRINO	(PET)...PRICE LAW FIRM, APC
DORIS NEUHAUS	(PET/OBJ)...J PATRICK RAGAN

Waiver of Court Fees and Costs filed by FRANK PELLEGRINO is GRANTED
Waiver of Court Fees and Costs filed by MARY LOUISE PELLEGRINO is GRANTED
Waiver of Court Fees and Costs filed by DORIS NEUHAUS is GRANTED
TOTAL FEES WAIVED TO DATE: \$3995.00

XREF: FAMSS1703685 MARY L PELLEGRINO -N- FRANK PELLEGRINO

GENERAL INFORMATION

Continued from 12/18/17. Court reset matter to 01/10/18 not as an ex parte.

THIS CASE IS SET FOR HEARING ON Application to Increase Bond by Mary Louise Pelligrino, a potential creditor

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

1. Petitioner Mary Louise Pelligrino, a potential creditor of The Frank Pellegrino Jr. Revocable Trust dated 11/29/07, requests a bond increase of \$100,000 for a total bond of \$200,000 under Pr. C. §8482. JTD
2. Petitioner argues the existing bond is insufficient because respondent/trustee, Doris Neuhaus, is now in possession of the trust assets, including a business interest in the commercial business, "Crazy Frank's Carpets," with a probable value exceeding petitioner's pending creditor's claim of \$182,693.00.
3. **Need** Notice of Hearing and proof of service.
4. ~Proposed Order: 12/12/17

RECOMMENDATION

Need notice, then Court's discretion.

(lh)

Future Hearings: 3/07/18: Readiness Calendar, 3/20/18: 2nd Amended Account & Report, 3/26/18: Court Trial, Status Conference, Petition for Verified Petition for Judgment on Creditor's Claim/Enforcement of Judgment, 3/27/18-3/29/18: Court Trial.

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500705

CASE NAME: PEGGY JO PETERSON

HEARING:

ACCOUNT OF RAYMOND D EDWARDS Account and Report of RAYMOND D EDWARDS and Petition for allowance of fees filed.

COUNSEL:

EDWARD LEE PETERSON (PET)...JEFF GROTKE
PEGGY JO PETERSON (DEC)...
JULIE A PETERSON (PET)...AMY YORK GARRETT
RAYMOND D EDWARDS (PET)...PRO/PER
CATHY S. PETERSON (OBJ)...PRO/PER
AMY YORK GARRETT ESQ
DEPARTMENT OF HEALTH CARE SERVICES

Waiver of Court Fees and Costs filed by EDWARD LEE PETERSON is GRANTED
TOTAL FEES WAIVED TO DATE: \$1685.00

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

XREF: CIVVS1201743 MUHAMMAD VS VVUSD

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Waiver of Account and Report of Raymond Edwards, former administrator

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

1. Accounting period: 05/23/16 to 12/07/16
2. Assets on hand: \$65,000, real property only
3. Petitioner does not request statutory compensation.
4. There is an approved creditor's claim from Julie A Peterson in the amount of \$6,305.40 for funeral expenses on other costs advanced.
5. There is an approved creditor's claim from DHS for \$29,110.23.
6. **Need distribution clause to successor administrator, Edward Peterson.**

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 for clarification of the notes only - no legal or procedural advice will be given.

7. **Need** notice to California Victim and Compensation and Government Claims Board per Pr. C. § 9202(b).
8. No proposed Order submitted.

RECOMMENDATION:

Need to clear notes 6-7, then Court's discretion. If approved, court to set hearing on filing of receipt and final discharge for **01/16/19**.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600200

CASE NAME: CHRISTINE STROMER

HEARING:
Accounting Review

COUNSEL:

ARTHUR STROMER	(PET)...MICHAEL GREEN
CHRISTINE STROMER	(DEC)...
GEORGIANN J STIVERS	(PET)...POOLE & SHAFFERY, LLP
GUY A STIVERS	(PET)...POOLE & SHAFFERY, LLP

GENERAL INFORMATION

Continued from 11/08/17.

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Testamentary issued to Georgiann and Guy Stivers, siblings, on 11/10/16; full authority, no bond.
2. Final Inventory and Appraisal filed.
3. **Need** accounting or status report.

RECOMMENDATION

Inquire status of accounting.

(ww/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600642

CASE NAME: MTR OF ERVHINS HURTADO

HEARING:
Accounting Review

COUNSEL:

LISSET A CORDOVI (PET)...PRO/PER
ERVHINS HURTADO (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Lisset Cordovi,
administrator

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

1. Letters of Administration issued to Lisset Cordovi on 11/02/16 with full authority; no bond.
2. **Need** final Inventory and Appraisal with supporting financial statements per Local Rule 20-908.
3. No accounting or status report of administration. **Need** same.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700971

CASE NAME: MTR OF WILLIAM PLEAS SMITH

HEARING:

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

COUNSEL:

RHONDA L SEYMOUR (PET)...ANDERSON & LEBLANC, A.P.L.C.
WILLIAM PLEAS SMITH (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON [Ancillary] Petition for Probate, Letters Testamentary with Full Authority under IAEA by Rhonda Seymour (executor/sole beneficiary)

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

1. Decedent was a non-resident of California and left an estate in this county in Ontario, California. Receipt of Will lodged on 09/28/17.
2. Bond waived; however, petitioner Rhonda Seymour is a sole beneficiary and non-resident of Las Vegas, Nevada. Court may require bond if the proposed personal representative resides outside California per and Pr. C. § 8571. Court also has discretion to require bond per Pr. C. § 8481(b). Estimated net value of estate is \$500,000, real property only. **JTD**
3. ~Proposed form Order: 09/28/17

RECOMMENDATION:

RFA, Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **03/20/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700991

CASE NAME: ROBERT ELLIS DUNLAP AKA ROBERT ELLIS DUNLAP III

HEARING:

Hearing re: Petition for Letters of Administration w/WA W/Full
Authority under IAEA.

COUNSEL:

RACHEL CAPATA (PET)...E. THOMAS CHAVEZ
ROBERT ELLIS DUNLAP (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Probate of Will, with Will Annexed,
and for Letters of Administration with **limited** authority under IAEA by Rachel Capata
(daughter)

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

1. Requested bond \$50,000. Estimated net value of estate is \$320,000. JTD
2. ~Proposed form Order: 10/04/17

RECOMMENDATION:

RFA, Court's discretion re bond. If approved, set future hearing for Accounting/Status
Review on **03/20/19**. Any accounting to be filed 30 days in advance. Note requirements of
Local Rules.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1701182

CASE NAME: Theodore A Wright Jr

HEARING:

Hearing re: Petition for Letters of Administration w/WA W/Full
Authority under IAEA.

COUNSEL:

TAHIRA WRIGHT (PET)...PRO/PER
THEODORE A WRIGHT (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON THIS CASE IS SET FOR HEARING ON Petition
for Probate of Will, with Will Annexed, and for Letters of Administration with **full** authority
under IAEA by Tahira Wright (daughter)

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

1. Petition requests Court waive bond; however, bond waivers by beneficiaries, Zyana Wright and Addie W. Wright, have not been filed. Also, petitioner Tahira Wright is a non-resident of New Jersey. Suggested bond \$123,423.00. JTD.
2. **Need** Declination to Act by named executor, Wells Fargo Bank.
3. **Need** Proof of Subscribing Witness as will is not self-proving. Witnesses did not signed under penalty of perjury.
4. **Need** Notice of Petition to Administer Estate.
5. **Need** Proof of Publication.
6. ~Proposed form Order: 11/27/17

RECOMMENDATION:

Need to clear notes 2-5. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **03/20/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

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

DATE: 01/10/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1501192

CASE NAME: MASTER MUHAMMAD SPECIAL NEEDS TRUST

HEARING:

SPECIAL NEEDS TRUST Account and Report of SEANNA LACKEY and
Petition for allowance of fees filed.

COUNSEL:

SEANNA LACKEY (PET)...NEIL J DE LEON
MASTER MUHAMMAD (PET)...THE BOUTIQUELAW GROUP
MASTER MUHAMMAD SPECIAL NEEDS TRUST (TRU)...

X-Ref: CIVVS1201743

GENERAL INFORMATION

Continued from 11/08/17 to clear notes.

THIS CASE IS SET FOR HEARING ON First and Current Account of Special Needs Trust
by Seanna Lackey, GAL/trustee

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

1. Accounting period: 11/17/16 to 03/23/17
2. Assets on Hand \$134,152.58, cash
3. Current bond: \$150,000 appears sufficient.
4. Petitioner does not request trustee fees or attorney fees.
5. Schedule C disbursements include compensation paid to trustee for computer supplies and creation of SNT totaling \$1,322.75 and payment attorney's fees totaling \$3,500 per Order entered 11/18/16 [Acct, 08/03/17, LFpgs12-13]. **Need** conformed copy of Order approving fees via verified supplement.
6. **Need** verified supplement indicating whether cash has been invested and maintained in an interest bearing account per Pr. C. §1064(a)(5).
7. **Supplement filed 12/11/17 not in LF at time of review.**
8. No proposed Order submitted. Submit after hearing.

RECOMMENDATION

Need to clear notes 5-6. If approved, set future hearing for Accounting/Status Review on **05/30/18**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1701151

CASE NAME: JANA PEARSON LIVING TRUST

HEARING:

Petition for Order Confirming Trust Assets and Determining
Validity of Trust

COUNSEL:

ANTHONY DALE PEARSON (PET)...ROSE C ROSADO
JANA PEARSON LIVING TRUST (TRU)...PRO/PER

Currently under review by Legal Research.

Notice is complete.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 01/10/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1701221

CASE NAME: NANCY FULTON LIVING TRUST

HEARING:

Petition for PETITION FOR ORDER TO SUSPEND AND REMOVE SUCCESSOR
TRUSTEE AND COMPEL COPY OF TRUST AND ASSETS

COUNSEL:

JACQUELINE MIKESELL

(PET)...HORSPPOOL & HORSPPOOL

THE NANCY FULTON LIVING TRUST

(TRU)...

Currently under review by legal research.

Notice is complete.

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIPS

DATE: 01/10/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1100101

CASE NAME: KRISTIN ANN MCCALLA

HEARING:

Petition for change of venue of Conservatorship

COUNSEL:

DOUGLAS B MCCALLA

(CP)...LAMBERT & ROGERS, APLC

JUDY R MCCALLA

(CP)...PRO/PER

KRISTIN ANN MCCALLA

(CTP)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for change of venue of Conservatorship by co-conservator Douglas McCalla (father)

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

1. On 08/17/01, Douglas McCalla (father) and Jud R. McCalla (mother) were appointed limited co-conservators of Kristin A. McCalla in San Diego County, later transferred to San Bernardino County on 01/05/12.
2. Petitioner Douglas McCalla seeks to remove conservatee, Kristin McCalla, from the residence of co-conservator, Judy McCalla, to San Diego County to reside with conservatee's sister, Heather McCalla, on or after 01/01/18.
3. Petitioner alleges co-conservator, Judy McCalla, is showing signs of early onset of dementia, is experiencing memory problems and difficulty with daily tasks, and as a result may no longer be able to perform duties as conservator.
4. No proposed order submitted.

RECOMMENDATION

Court's discretion.

(lh)

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

DATE: 01/10/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1400314

CASE NAME: Alon Knight

HEARING:
Petition for ATTORNEYS FEES

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ALON KNIGHT	(CEP)...ROBERTA L. TAYLOR & ASSOCIATES
JAMES LYNN	(CPE)...PRO/PER
JOELLE LEE A. NICOL	(PET)...ARCHANGEL ESTATE PLANNING & TR
JAMES LYNN	(OBJ)...PRO/PER
GHASSAN E HADI	(WALRAVEN & WESTERFELD LLP)

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Attorney Fees by Joelle Lee A. Nicol

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

1. Petitioner, Joelle Lee A. Nicol, was appointed 'practice administrator' for Roberta L. Taylor.
2. Attorney Roberta Taylor was appointed Counsel for conservatee, Alon W. Knight, on 11/03/14, and was relieved as Counsel on 06/12/17. For the period of 11/05/14 to 04/26/17, Ms. Taylor rendered 56.25 hours at \$300/hour, and attorney Joelle Lee A. Nicol rendered 15.25 hours at \$280.00/hour, totaling **\$21,146.00 in attorney services**, and \$151 in costs. Itemized.
 - a. Per Local Rule 20-1402(a), it does not appear appointed Counsel Roberta Taylor obtained Court approval to delegate tasks to Counsel Joelle Lee A. Nicol Taylor totaling \$4,270 in billed attorney services. **JTD.**
 - b. Petitioner's request for fees exceeds a two-year period, violating Local Rule 20-1402(b). **Need** verified supplement showing good cause why fees should not be denied. **Note: Supp 12/26/17 does not clear note.**
 - c. **Supp 12/26/17 County Counsel and PG advocated for worker's compensation due conservatee which was approved on 07/26/17. Attorney Roberta Taylor submitted a voucher to the County of San Bernardino for payment for her services as court-appointed counsel due to limited assets of the estate. Her voucher for \$3,921 was allegedly**

received and approved in August, 2017. Said sum to be refunded to the County of San Bernardino upon Court approval of attorney fees.

3. **Need** Notice of Hearing and Proof of Service as to Alon Knight.
4. ~Proposed Order: 12/26/17

RECOMMENDATION

Need to clear note # 2b and #3, then Court's discretion.

(lh)

Future Hearing: 4/09/18: 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: 01/10/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500297

CASE NAME: MTR OF SOLVEIG MCCLOUD

SEE ALSO 20

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of RHONDA MCCLOUD

COUNSEL:

RHONDA MCCLOUD	(PET)...PRO/PER
SOLVEIG MCCLOUD	(PCE)...ROSE C ROSADO
PUBLIC GUARDIAN	(TP)...COUNTY COUNSEL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Court appointed Rhonda McCloud as Conservator of the person only. Revised Order filed and Letters issued 03/16/17.
2. Notification of Cnservatee's Rights, Determination of Conservatee's Appropriate Level of Care and Care Plan filed .

RECOMMENDATION

None.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 01/10/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500297

CASE NAME: MTR OF SOLVEIG MCCLOUD

SEE ALSO 19

HEARING:

Hearing Re: STATUS REVIEW

COUNSEL:

RHONDA MCCLOUD

(PET)...PRO/PER

SOLVEIG MCCLOUD

(PCE)...ROSE C ROSADO

PUBLIC GUARDIAN

(TP)...COUNTY COUNSEL

See notes on prior matter.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700112

CASE NAME: EDWARD URBINA DIAZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ANGELA DIAZ

COUNSEL:

ANGELA DIAZ	(PET)...PRO/PER
ROMAN URBINA GARCIA	(PET)...PRO/PER
EDWARD URBINA DIAZ	(CEE)...CRAIG M PARKER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Angela Diaz appointed Conservator of the person on 06/07/17.
2. **Need** Notification of COnservatee's rights per Pr. C. §1830(c).
3. **Need** a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).
4. **Need** Care Plan in accord with Pr. C. §2352.5.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 01/10/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700310

CASE NAME: BRYAN ALVARENGA

HEARING:

Petition for Appointment of Conservator

COUNSEL:

JORGE ALVARENGA	(PET)...SHENIECE J SMITH
EUNICE ALVARENGA	(PET)...SHENIECE J SMITH
BRYAN ALVARENGA	(CEE)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Jorge and Eunice Alvarenga, parents

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, and make decisions re education.
JTD
2. Petitioner seeks medical powers. **Capacity Declaration filed 12/22/17.**
3. Proposed conservatee is developmentally disabled. **Need** appointment of counsel for report.
4. Proposed conservatee is developmentally disabled. **Need** IRC report.
5. **CI Report filed 01/02/18.**
6. Proof of Completion of the Conservatorship Training Class filed 10/27/17.
7. Return of Citation with proof of personal service filed 11/20/17.
8. ~Proposed Form Order: 08/16/17

RECOMMENDATION

Need to clear notes 3-4. If approved, set hearing for Compliance Review for **08/15/18** 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.
(lh)

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

DATE: 01/10/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700443

CASE NAME: CONCEPCION R RODARTE

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CANDELARIA MCFARLAND (PET)...PRO/PER
CONCEPCION MCFARLAND (CEE)...

GENERAL INFORMATION

Ex parte orders granted on 10/12/17, no bond. Candelaria McFarland appointed temporary conservator of the person and estate.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Candelaria McFarland, daughter

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

1. Suggested bond \$22,894.30, based on personal property. JTD
2. Petitioner seeks medical powers. **Need** Capacity Declaration.
3. Petitioner seeks dementia powers. **Need** appointment of counsel for report.
4. **Need** Certificate of Completion of the Conservatorship Training Class.
5. **Need** return of citation.
6. **Need** notice of hearing and proof of service.
7. **CI Report filed 01/03/18.**
8. ~Proposed Form Order: 12/05/17

RECOMMENDATION

Need to clear notes 2-6. If approved, set hearing for Compliance Review for **08/15/18** for the filing of the required documents and hearing re Accounting Review for **03/20/19**. Any accounting to be filed 30 days in advance.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1600911

CASE NAME: THERESA AILEEN CORTEZ LIVING TRUST

VACATED

HEARING:

Hearing Re: COURT TRIAL (THIRD 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

Future Hearing: 1/11/18-1/12/18: Court Trial

Court Trial—no notes—JTD

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: 01/10/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701194

CASE NAME: ESTATE OF ANDRE SPENARD

HEARING:

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

COUNSEL:

VALERIE SPENARD

(PET)...JOELLE LEE A NICHOL

ANDRE SPENARD

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING Petition for Letters of Administration with Full
Authority under IAEA by Valerie Spendard, spouse

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

1. This appears to be an ancillary probate.
2. All heirs waive bond. However, petitioner is a non-resident of Washington. The Court may require bond if the proposed personal representative resides outside California per and Pr. C. § 8571. Court also has discretion to require bond per Pr. C. § 8481(b). Does court wish to require minimum bond of \$20,000 or alternatively based on real property of \$300,000? **JTD.**
3. **Proof of Publication filed 12/26/17 indicates notice was published with Hesperia Reporter.** As decedent was a non-resident, question what city real property is situated in to verify proper publisher? **Need verified supplement.**
4. ~Proposed form Order: 11/29/17

RECOMMENDATION:

Need to clear note #3; Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **03/20/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS0600334

CASE NAME: MTR OF ERIN ELIZABETH WILSON

SEE ALSO 3

HEARING:

Motion Re: TO BE RELIEVED AS COUNSEL Filed by Petitioner
CLIFFORD BRACE

COUNSEL:

SUSANNE CHRISTENSEN	(PET)...DIANA J. CARLONI
ERIN ELIZABETH WILSON	(DEC)...
CLIFFORD BRACE	(OBJ)...HODGE & BARTOUMIAN

GENERAL INFORMATION:

Continued from 08/15/17. No appearance. Notice by Judicial Assistant.

Continued from 10/11/17. No appearance. Court continues matter to the accounting review date.

THIS CASE IS SET FOR HEARING ON Motion to be relieved by Counsel by Stanley W. Hodge ["Petitioner"].

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

1. Declaration in support of motion filed 06/15/17. However, **need** mandatory form Declaration [MC-052].
2. Petitioner, Stanley W. Hodge, makes this motion to be relieved as counsel under Code of Civil Procedure section 284(2) instead of filing consent under section 284(1) and alleges all communication has broken down between the client and attorney and it is impossible to continue to appear for Mr. Brace.
3. ~Proposed Form Order 06/07/17.

RECOMMENDATION:

Need to clear note 1, then Court's discretion.

(nb/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS0600334

CASE NAME: MTR OF ERIN ELIZABETH WILSON

SEE ALSO 2

HEARING:

Accounting Review

COUNSEL:

SUSANNE CHRISTENSEN	(PET)...DIANA J. CARLONI
ERIN ELIZABETH WILSON	(DEC)...
CLIFFORD BRACE	(OBJ)...HODGE & BARTOUMIAN

GENERAL INFORMATION

Continued from 10/11/17. Bankruptcy Court to review Omnibus Motion.

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 Susanne Christensen, daughter, on 03/14/07; full authority, no bond.
2. Previous status report approved on 06/12/17.
3. Notice of hearing and proof of service filed; however, a status report has yet to be filed.
4. Declaration of Diana Carloni filed 09/20/17 regarding pending Omnibus Motion with Bankruptcy Court.
5. **Need** accounting or status report.

RECOMMENDATION

Inquire status of accounting.

(ww/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1200854

CASE NAME: ALFRED CHARLES LAWRENCE

HEARING:

Hearing re Final Discharge

COUNSEL:

VALERIE LAWRENCE HANNIGAN	(PET)...BURLISON LAW GROUP
ALFRED CHARLES LAWRENCE	(DEC)...
WALTER T MOORE	(PET/GAL)...WALTER T. MOORE
NEIL PATRICK HIERS	(ANY)...

GENERAL INFORMATION

Continued from **07/05/17**. Counsel stated the vehicle has been disposed of and receipt has been submitted.

Continued from **09/06/17**.

Continued from 11/08/17. Counsel states Ex Parte Petition for Final Discharge was submitted but it is not showing in the ROA. Matter continued.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Valerie Hannigan, daughter, approved on 06/29/16. Proposed order submitted 08/17/17 was returned on 08/31/17 for corrections. **Need Order approving final account.**
2. No receipt required; petitioner is sole heir.
3. **Need** Ex Parte Petition for Final Discharge and Order with recording information per Pr.C. §11753(b) once note 1 is cleared.

RECOMMENDATION

Inquire status.

(lc/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1200864

CASE NAME: MTR OF EDWARD ANTHONY BYERS

HEARING:

Probate status report filed.

COUNSEL:

EDWARD R BYERS	(PET)...JOHN F WEBER
EDWARD ANTHONY BYERS	(DEC)...
TONJA DISHMON	(PET/TP)...ESTELLE & KENNEDY

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report of Administration by Edward R. Byers, Administrator

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

1. Letters of Administration with no authority were issued to Edward R. Byers on 10/27/16
2. Petitioner alleges the estate is not in a condition to be closed as the real property is currently in escrow. A report of sale was filed on 07/26/17, and Court confirmed sale at hearing on 10/30/17 for \$50,000.
3. Petitioner requests an additional 12 months to close the estate.
4. **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. **This form of notice is mandatory.**

RECOMMENDATION:

Require notice then Court's discretion. If approved, set next hearing for Accounting Review on **09/19/18**.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1401134

CASE NAME: Celia A Ramirez

SEE ALSO 7 8

HEARING:

Hearing Re: REMOVAL OF ADMINISTRATOR

COUNSEL:

ERIC B RAMIREZ (PET)...LAW OFFICES OF LINDA ROBERTS
CELIA A RAMIREZ (DEC)...
ESTHER M DAVID (PET/TP)...HARTNELL LAW GROUP
DEPARTMENT OF HEALTH CARE SERVICES (PRO/PER)

GENERAL INFORMATION

Continued from **09/19/16 and 11/28/16**. Court orders an accounting to be filed 12/21/16. Court orders that all monies be placed into a blocked account. All temporary orders to remain.

Continued from **02/06/17 and 04/10/17**. Counsel represent all parties agree to the listing of property for sale. Counsel is to communicate regarding approval of sale.

Continued from 06/26/17 Proof of blocked account has not been filed. Copy of check and proof it was placed into blocked account must be filed by 06/28/17 or administrator will be removed.

Continued from 09/18/17 to hearing pending matters.

Continued from 10/12/17. An oral motion was made to reinstate Eric Ramirez.

THIS CASE SET FOR HEARING ON Petition for Removal of Administrator (Eric Ramirez) by Esther M. David, daughter Pr.C. §§ 850, 859, 8500, 8540.

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

1. Letters Testamentary issued to Eric Ramirez on 6/27/16, no bond. (Order appointing was granted 8/21/15.) Eric Ramirez suspended on 08/01/16 and Letters of Special Administration were issued to Esther David, daughter, \$20,000 bond.
2. Petitioner, Esther David, is seeking removal of executor Eric Ramirez. Petitioner alleges that Eric has wrongfully taken, concealed and disposed of property in the estate. Petitioner additionally cites Pr.C. § 859 that Eric be twice liable for assets taken. Grant deed attached to petition showing real property was transferred by Eric as executor to himself [LFpg8].

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 for clarification of the notes only - no legal or procedural advice will be given.

3. Waiver of Notice filed 11/14/16 by Sylvia Vizcarra, and Jose Juan Ramirez on 11/21/16.
4. Order Voiding Grant Deed 02/06/17.
5. Proof of blocked account filed on 08/22/17.
6. **Objections filed 11/21/16 by suspended administrator, Eric Ramirez.**
7. **Declaration of Juan Ramirez in support of Objections by Eric Ramirez filed on 01/26/17.**

RECOMMENDATION

Matter is contested.

(lc/nb/ww/lc/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1401134

CASE NAME: Celia A Ramirez

SEE ALSO 6 8

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS OF
ADMINISTRATION WITH WILL ANNEXED

COUNSEL:

ERIC B RAMIREZ (PET)...LAW OFFICES OF LINDA ROBERTS
CELIA A RAMIREZ (DEC)...
ESTHER M DAVID (PET/TP)...HARTNELL LAW GROUP
DEPARTMENT OF HEALTH CARE SERVICES (PRO/PER)

GENERAL INFORMATION

Continued from **11/28/16**.

Ex parte hearing on **01/11/17** for Authority to Administer under IAEA was heard and taken off calendar. Partial settlement was reached at mediation and parties agreed to sell the real property. Counsel to prepare order.

Continued from 02/06/17 and 04/10/17. The Court addresses probate note #2 on the record.

Continued from 06/26/17, 09/18/17, 10/18/17.

THIS CASE SET FOR HEARING ON Petition for Probate, **Successor** Letters of Administration W/WA with Full Authority under IAEA **by Esther David, daughter.**

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

1. Temporary Letters issued 01/09/17 to petitioner Esther David, daughter.
2. Petitioner Esther David requests no bond and all proceeds of sale to be placed into blocked account. There does not appear to be personal property.
3. **Need** proof of publication.
4. Does Court wish to require the Order on partial settlement that was reached on 01/11/17?
5. ~Proposed Form Order: 07/27/16.

RECOMMENDATION

Need to clear note 3. Prior administrator needs to be removed prior to granting this petition. If approved, set Accounting/Status Review for **03/20/19**. Any account to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.
(lc/nb/ww/lc/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1401134

CASE NAME: Celia A Ramirez

SEE ALSO 6 7

HEARING:

Accounting Review

COUNSEL:

ERIC B RAMIREZ (PET)...LAW OFFICES OF LINDA ROBERTS
CELIA A RAMIREZ (DEC)...
ESTHER M DAVID (PET/TP)...HARTNELL LAW GROUP
DEPARTMENT OF HEALTH CARE SERVICES (PRO/PER)

GENERAL INFORMATION

Continued from **6/21/16** for Eric Ramirez, son, to appear.

On **8/1/16** Eric Ramirez, suspended and Esther David, daughter appointed Special Administrator with authority to file an 850 petition and marshal assets.

Continued from 08/31/16, 09/19/16, 11/28/16, 02/06/17, 04/10/17 and 06/26/17, 09/18/17, and 10/12/17.

THIS CASE IS SET FOR HEARING ON Accounting/Status Review (re Eric Ramirez)

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

1. Letters Testamentary issued to Eric Ramirez, son, on 6/27/16, no bond. (Order appointing was granted 8/21/15.) However, as Eric Ramirez, is now suspended and no I&A filed. Court may wish to inquire if any assets were marshaled thus requiring an accounting.
2. Partial Inventory and Appraisal filed 02/06/17 by Eric Ramirez. **Need** a final inventory & appraisal.
3. **Need** an accounting or status report.

RECOMMENDATION:

Need to clear notes 2-3. 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/sa/lc/nb/ww/lc/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500025

CASE NAME: YOKE YING TAN

HEARING:

Probate status report filed.

COUNSEL:

JASON VIEGAS	(PET)...MITCHELL I ROTH
YOKE YING TAN	(DEC)...
JONATHAN VIEGAS	(OBJ)...RICHARD W.S. PERSHING

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report of Administration by Jason Viegas, administrator/son

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

1. Letters of Administration with full authority issued to Jason Viegas 06/28/19, with \$218,000 bond.
2. Petitioner alleges the estate is not in a condition to be closed as administrator Jason Viegas is awaiting the final inventory of assets from the probate referee.
3. Petitioner requests an additional 6 months to close the estate.
4. ~Proposed Order: 01/10/18

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **04/18/18**.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 01/10/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600006

CASE NAME: MTR OF CHARLES A JACOBS

VACATED

HEARING:

Hearing re Final Discharge

COUNSEL:

MAXINE J THOMPSON

(PET)...PRO/PER

CHARLES A JACOBS

(DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge re Maxine J. Thompson,
administrator

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

1. **Need** receipts from Maxine J. Thompson, Harold J. Jacobs, and Millicent Fromm.
2. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600626

CASE NAME: MTR OF MICHAEL DAVID CUNNINGHAM

HEARING:
Accounting Review

COUNSEL:
MARGARET LOUISE CUNNINGHAM (PET)...PRO/PER
MICHAEL DAVID CUNNINGHAM (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re: Margaret Cunningham

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

1. Letter Testamentary issued to Margaret Louise Cunningham on 10/26/16 with full authority; no bond.
2. **Need** final Inventory and Appraisal with supporting financial statements per Local Rule 20-908.
3. No accounting or status report of administration. **Need same.**

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600944

CASE NAME: MTR OF TIMOTHY JERSCHIED

HEARING:
Accounting Review

COUNSEL:
PHYLLIS JERSCHIED (PET)...FARHAT & ASSOCIATES
TIMOTHY JERSCHIED (DEC)...

GENERAL INFORMATION

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 Phyllis Jerscheid on 11/03/16 with full authority; no bond.
2. **Need** final Inventory and Appraisal with supporting financial statements per Local Rule 20-908.
3. No accounting or status report of administration. **Need same.**

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 01/10/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601084

CASE NAME: GARY SCOTT MESTAS

HEARING:

Petition to determine succession to Real Property

COUNSEL:

MARY WATKINS	(PET)...PRO/PER
GARY SCOTT MESTAS	(DEC)...
BRYAN C HARTNELL	(TP)...

Waiver of Court Fees and Costs filed by MARY WATKINS is GRANTED

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property
by Mary Watkins, mother/administrator

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

1. Court appointed Mary Watkins (mother) administrator with full authority on 03/08/17, \$137,000 bond. Note: letters have not been issued.
2. Petitioner seeks 100% interest in decedent's 100% interest; in real property per the will.
3. **Need** Notice of hearing and proof of service as to: Erica Rivas, Rebecca Rivas, Tawny Rivas and Bryan C. Hartnel (attorney for Rita Rvias, RSN filed), Steve Mestas and Andrew Watkins.
4. No proposed order submitted.

RECOMMENDATION

Need notice, then Court's discretion.

(lh)

Future Hearing: 5/16/18: Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701016

CASE NAME: KARAN ANN KIDD

HEARING:

Hearing Re: OSC RE: BANK SHOULD NOT BE RESTRAINED

COUNSEL:

MICHAEL ALLEN PARR (PET)...PRO/PER
KARAN ANN KIDD (DEC)...

No notes—Court's discretion.

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

DATE: 01/10/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701144

CASE NAME: MARGARET VENEMA

HEARING:

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

COUNSEL:

CLARA ESPINOZA (PET)...PRO/PER
MARGARET VENEMA (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by David Venema, Mark Venema and Clara Espinoza, to appoint Clara Espinoza (executor)

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

1. Petitioner alleges all beneficiaries waive bond. Estimated net value of estate is \$310,000. Court also has discretion to require bond per Pr. C. § 8481(b). 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 clarifying decedent's date of death as petition indicates date of death as 06/52/17.
3. **Need** Proof of Publication.
4. **It cannot be determined if notice is complete until note #2 is cleared.**
5. ~Proposed form Order: 11/14/17

RECOMMENDATION:

Need to clear notes 2-3. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **03/20/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.
(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 01/10/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700835

CASE NAME: THOMAS A GOODELL

HEARING:

Hearing Re: Bond Review

COUNSEL:

CHRISTINE MOORE

THOMAS A GOODELL

(PET)...ERIKA PETERSON

(DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Bond Review

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

1. Matter set on 12/27/17, wherein, Court appointed Christine Moore as executor with full authority, \$225,000 bond. **Note: Letters have not issued.**
2. **Need** issued Letters and proof of bond.

RECOMMENDATION

Inquire status.

(lh)

Future Hearing: 3/06/19: Accounting Review

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIPS**

DATE: 01/10/18 TIME: 8:30 DEPT: S36P

CASE#: CON PS0700044

CASE NAME: MTR OF MELISSA DAYTON

SEE ALSO 17

HEARING:

Hearing Re: SUCCESSOR TRUSTEE'S ACCOUNT

COUNSEL:

JEANNE DAYTON (CPE)...JAMES BRUCE MINTON

MELISSA DAYTON (CEP)...

JEAN DAYTON (CPE)...JAMES L HEYWOOD

SHERRI L KASTILAHN (PET)...

JAMES BRUCE MINTON (CPE)...JAMES BRUCE MINTON

THE MELISSA DAYTON SPECIAL NEEDS TRUST (TRU)...

JAMES BRUCE MINTON (TEE)...DIANA J CARLONI

See notes on next matter #17.

(lh)

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

DATE: 01/10/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS0700044

CASE NAME: MTR OF MELISSA DAYTON

SEE ALSO 16

HEARING:

Hearing Re: FIRST ACCOUNTING OF JAMES HEYWOOD

COUNSEL:

JEANNE DAYTON	(CPE)...	JAMES BRUCE MINTON
MELISSA DAYTON	(CEP)...	
JEAN DAYTON	(CPE)...	JAMES L HEYWOOD
SHERRI L KASTILAHN	(PET)...	
JAMES BRUCE MINTON	(CPE)...	JAMES BRUCE MINTON
THE MELISSA DAYTON SPECIAL NEEDS TRUST (TRU)...		
JAMES BRUCE MINTON	(TEE)...	DIANA J CARLONI

GENERAL INFORMATION

Continued from 11/01/17.

THIS CASE SET FOR HEARING ON Accounting review re James Heywood, successor Trustee.

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

1. James Heywood appointed successor Trustee on 08/11/15.
2. **Need accounting.**

RECOMMENDATION

Inquire status of accounting.

(lc/lh)

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

DATE: 01/10/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600154

CASE NAME: SANDY CIRA RODRIGUEZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of LILIA DE PABLO

COUNSEL:

LILIA DE PABLO (CP)...PRO/PER
SANDY CIRA RODRIGUEZ (CTP)...WALTER T. MOORE

GENERAL INFORMATION:

Continued from 07/26/17. Attorney Walter Moore to assist with required documents.

Continued from **09/27/17**.

Continued from 11/01/17. Conseratee's rights filed 06/09/16.

THIS CASE IS SET FOR HEARING ON Compliance Review.

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

1. Lilia De Pablo, mother, appointed limited conservator of the person only on 12/21/2016.
2. **Notification** of Conservatee's rights filed.
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr. C. §2352.5.

RECOMMENDATION:

Need to clear notes 3-4.

(ww/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700060

CASE NAME: MTR OF MARIA MOLINA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of GUADALUPE L MERINO

COUNSEL:

GUADALUPE L MERINO (CP)...PRO/PER
MARIA MOLINA (CTP)...JEANNE KENNEDY

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Guadalupe Merino was appointed Conservator of the person on 06/07/17.
2. **Need** Notification of Conservatee's rights per Pr. C. §1830(c).
3. **Need** a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).
4. **Need** Care Plan in accord with Pr. C. §2352.5.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 01/10/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700445

CASE NAME: NOHEMY BECERRA

HEARING:
Petition for Appointment of Conservator

COUNSEL:

MARIA H BACERRA (CP)...PRO/PER
NOHEMY BECERRA (CTP)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Maria Becerra (sister)

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, and make decisions re education. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks medical powers. **Capacity Declaration filed 12/07/17; however, physicians initials are missing in #7b. Need completed form.**
4. Proposed conservatee is developmentally disabled. **Need** report of Counsel Sandy Turner.
5. Proposed conservatee is developmentally disabled. **Need** IRC report.
6. **Need** Certificate of Completion of the Conservatorship Training Class.
7. **Return of Citation filed 12/21/17; however, proof of personal service indicates petitioner served proposed conservatee Nohemy Bacerra. Need proper personal service by a non-party.**
8. **Notice of Hearing filed 12/21/17; however, need proper mailed service to Inland Regional Center to include at least 30 days' notice.**
9. **CI Report filed 01/03/18.**

10. ~Proposed Form Order: 12/07/17

RECOMMENDATION

Need to clear notes 3-8. If approved, set hearing for Compliance Review for **08/15/18** 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.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 9:30 DEPT: S36P

CASE#: VC VS00424

CASE NAME: MTR OF PAMELA YVONNE BAXTER

HEARING:

Hearing Re: CONCERNS FROM THE CI REPORT

COUNSEL:

DONALD EARL BAXTER	(PET)...JANIS L HILKE
PAMELA YVONNE BAXTER	(PCE)...SHERRI L KASTILAHN
BARBARA GUERRY	(OBJ)...PRO/PER

XREF: VPRVS002831 *ESTATE OF RUBY N RONEY*

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON CONCERNS FROM THE CI REPORT

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

1. Matter set on Court's own motion upon receipt of CI report on 12/11/17. Court re-appointed Attorney Sherri Kastilahn for Pamela Baxter. Conservator Donald Baxter and Conservatee Pamela Baxter to be present at hearing on 01/10/18.
2. **Need Report of Counsel Kastilahn.**

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **MISC.**

DATE: 01/10/18 TIME: 1:30 DEPT: S36P

CASE#: PRO PS1601028

CASE NAME: BRINKSMA FAMILY TRUST

HEARING:

Mediation Settlement Conference

COUNSEL:

SUSAN ANN BRINKSMA (PET)...NEIL J DE LEON

BRINKSMA FAMILY TRUST (TRU)...

MARK SYDNEY BRINKSMA (PET/OBJ)...COPENBARGER & COPENBARGER

Future Hearings: 1/24/18: Trustee's first Account & Report, Trial Setting Conference

No notes—MSC

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 01/10/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500807

CASE NAME: JEANETTE S. CRYER

HEARING:

Hearing re Final Discharge

COUNSEL:

JENNIFER CRYER

(PET)...HORSPPOOL & HORSPPOOL

JEANETTE S. CRYER

(DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge of Jennifer Cryer, administrator

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

1. Receipts filed.
2. Ex Parte Petition for Final Discharge and Order forwarded to department for signature. ~proposed order: 12/06/17

RECOMMENDATION

None.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600797

CASE NAME: DONALD RAYMOND GABBARD

HEARING:
Accounting Review

COUNSEL:

BETSY MOORE (PET)...THEODORE
DONALD RAYMOND GABBARD (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Betsey Moore,
administrator

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

1. Letters of Administration with full authority issued to Betsey Moore, \$275,000 bond.
2. **Need** final Inventory and Appraisal with supporting financial statements per Local Rule 20-908.
3. No accounting or status report of administration. Need same.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 01/10/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600809

VACATED

CASE NAME: MTR OF ISABEL SAENZ

HEARING:

Accounting Review

COUNSEL:

LOUIE C SAENZ

(PET)...CHRISTINA E GENTILINI

ISABEL SAENZ

(DEC)...

Future Hearing: 11/19/18: Hearing Re: Final Discharge of Louie Saenz

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600917

CASE NAME: MTR OF LILEAN SARAH ATTEBERRY

SEE ALSO 5

HEARING:

Petition for TERMINATION OF PETITION TO DETERMINE SUCCESSION TO
REAL PROPERTY

COUNSEL:

PATRICIA LILY TILLEY (PET)...JOHN F WEBER
LILEAN SARAH ATTEBERRY (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for TERMINATION OF PETITION TO
DETERMINE SUCCESSION TO REAL PROPERTY by Patricia Lily Tilley (sister)

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

1. Petitioner, Patricia Lily Tilley, sister of decedent, filed a Petition to Determine Succession to Real Property on 09/02/16. See next matter #5.
2. It appears petitioner Patricia Lily Tilley seeks to dismiss her Petition to Determine Succession to Real Property as it was discovered decedent was not an owner to subject real property in initial petition; decedent was a resident of Idaho and does not own any property in California.
3. ~Proposed Order: 09/19/17

RECOMMENDATION

Court's discretion.

(lh)

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

DATE: 01/10/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600917

CASE NAME: MTR OF LILEAN SARAH ATTEBERRY

SEE ALSO 4

HEARING:

Petition to determine succession to Real Property

COUNSEL:

PATRICIA LILY TILLEY (PET)...JOHN F WEBER
LILEAN SARAH ATTEBERRY (DEC)...

GENERAL INFORMATION:

Matter set at **11/22/16** hearing due to non-appearance. Notice by Judicial Assistant.
Continued from **01/24/17** at request of petitioner to clear notes and seek legal counsel.
Continued from **04/11/17**. No appearance. Notice to be given by petitioner.
Continued from **06/27/17** at request of petitioner. Notice to be given by petitioner.
Continued from 08/29/17 at request of counsel.
Continued from 11/07/17 to trail another hearing set. Notice to be given by Mr. Weber.

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by Paticia Lily Tilley, sister.

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

1. Petitioner alleges Decedent was not a resident of California, but owned real property in Yermo, California at the time of death.
2. Petition indicates decedent was survived by issue and issue of a predeceased child. However, attachment does not include issue, issue of predeceased child or other heirs as alleged. Additionally, petition needs to include all parties claiming an interest per Pr. C. § 13151. Need amended petition.
3. Inventory & Appraisal attached to petition has the following issues:
 - a. Sections 4 & 5 incomplete.
 - b. No signatures on the I&A. Need signatures of verification by all heirs.
 - c. Need full legal description of real property listed on Attachment 2. Need corrected inventory.
4. **Matter appears moot as petitioner Patricia Tilley seeks to dismiss petition per prior matter #4.**

5. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Matter appears moot.

Need to clear notes, then Court's discretion.

(nb/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601119

CASE NAME: MTR OF DANIEL D ZUNIGA

SEE ALSO 7

HEARING:

Petition for TERMINATION OF PROCEEDINGS AND DISCHARGE

COUNSEL:

RICHARD A ZUNIGA	(PET)...JACQUELINE PELAEZ
DANIEL D ZUNIGA	(DEC)...
ESTHER ZUNIGA	(PET)...JOHN F WEBER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Termination of Proceedings and Discharge of petitioner Esther Zuniga, spouse

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

1. Petitioner Esther Zuniga, spouse of decedent Daniel Zuniga, filed a petition for letters of administration on 12/21/16. See notes on next matter #7.
2. Petitioner Esther Zuniga seeks to dismiss her petition for letters of administration, as it is a no-asset estate and there are no creditors' claims.
3. ~Proposed Order: 09/19/17

RECOMMENDATION

Court's discretion.

(lh)

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

DATE: 01/10/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601119

CASE NAME: MTR OF DANIEL D ZUNIGA

SEE ALSO 6

HEARING:

Petition for PROBATE LETTERS OF ADMINISTRATION W/LIMITED IAEA

COUNSEL:

RICHARD A ZUNIGA	(PET)...JACQUELINE PELAEZ
DANIEL D ZUNIGA	(DEC)...
ESTHER ZUNIGA	(PET)...JOHN F WEBER

GENERAL INFORMATION

Continued from **03/07/17**. Counsel request petition filed by Mr. Zuniga be denied. Petition filed by Richard Zuniga on 11/08/16 is denied without prejudice.

Continued from **06/27/17** court gives tentative decision of granting petition and ordering a bond of \$325,000.

Continued from 08/22/17. Request for dismissal as a no asset estate may be filed.

Continued from 10/18/17 at request of Counsel to be heard with Petition for Termination.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration, full authority, by Esther Zuniga, spouse.

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

1. Petitioner alleges that she is sole heir and waives bond. The estate consists of \$324,960 in personal property that consists of unclaimed joint and p.o.d accounts being held by the state.
2. **Petition to Terminate Estate Proceedings Esther Zuniga filed 09/19/17. See notes on by prior matter #6. Matter appears moot.**
3. ~Proposed Form Order/Letters 12/21/16.

RECOMMENDATION:

Matter appears moot.

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

(lh/nb/lh/cs/nb/ww/lh)

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

DATE: 01/10/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700807

CASE NAME: BETTY IRENE PADILLA

HEARING:

Petition to determine succession to Real Property

COUNSEL:

JOE FLOYD PADILLA	(PET)...JOHN F WEBER
ANGELA PADILLA	(PET)...JOHN F WEBER
VICTOR PADILLA	(PET)...JOHN F WEBER
BETTY IRENE PADILLA	(DEC)...

GENERAL INFORMATION:

Continued from 11/14/17 at request of Court to clear probate notes. Court requests copy of vesting document to be filed.

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less).

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

1. Petitioners request a determination that decedent's real property located at Barstow, CA, in San Bernardino County pass to petitioners without administration. Petitioners are decedent's siblings and purported heirs under the laws of intestacy.
2. Copy of Joint Tenancy Grant Deed filed 12/06/17.
3. ~Proposed Form Order 08/10/17

RECOMMENDATION:

Court's discretion.

(nb/lh)

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

DATE: 01/10/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700927

CASE NAME: MTR OF JASMATEE SATRAHAN

HEARING:

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

COUNSEL:

HARRY NARINE (PET)...ACCESS LAWYERS GROUP
JASMATEE SATRAHAN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Harry Narnine, son/executor

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

1. Will waives bond. Estimated net value of estate is \$0.00.
2. Petition indicates estate has no California property. **Need** further clarification via verified supplement.
3. The will conditionally incorporates decedent's Trust. **Need** Certification of Trust that meets the requirements in Pr. C. § 18100.5, to include a list of Trust beneficiaries for notice purposes. Does Court also wish to require a copy of decedent's Trust? JTD
4. **Need** Notice of Petition to Administer Estate with proof of service to trustee of The Jasmatee Satrahan Trust.
5. ~Proposed form Order: 09/20/17

RECOMMENDATION:

Need to clear notes 2-4. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **03/20/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

Superior Court of Calif, County of San Bernardino
Page: 9A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 01/10/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700900

CASE NAME: MTR OF ALFRED R BURGOS

HEARING:
Spousal Property Petition hearing.

COUNSEL:
ALFRED R BURGOS (DEC)...
ANITA BURGOS (PET)...SUZANNE M GRAVES

GENERAL INFORMATION

Continued from 12/28/17 for examiner to review verified supplement filed this date.

THIS CASE SET FOR HEARING ON Spousal Property Petition by Anita Burgos.

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

1. Petitioner seeks court confirm her half of community property.
2. Petitioner and decedent were married 10/09/1983 and remained married until decedent's death on 08/08/18. Property was purportedly purchased with community funds on 09/30/08; however, decedent deeded property to himself as his sole and separate property.
3. Decedent and petitioner allegedly resided in said property with daughter Rebecca Casarotti, and decedent deeded a 50% interest to Rebecca with the intention that Rebecca would have sole ownership of the house at his death. Title was mistakenly taken as Tenants in Common. Deed attached. See Supp filed 12/28/17, LFpgs8-10].
4. Petitioner seeks Court to determine decedent's 50% interest is petitioner's property to allow petitioner to deed interest to daughter Rebecca to fulfill decedent's intent.
JTD.
5. ~Proposed Order: 12/28/17

RECOMMENDATION

Court's discretion.

(lc/lh)

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

DATE: 01/10/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1500586

CASE NAME: ANGELINE P. TSEKO REVOCABLE TRUST

HEARING:

Motion Re: NOTICE OF MOTION TO TAX COSTS DECLARATION OF GEORGE TSEKO AND MEMORANDUM ETC Filed by Petitioner GEORGE TSEKO

COUNSEL:

ANGELINE P. TSEKO REVOCABLE TRUST (TRU)...
GEORGE TSEKO (APP)...JOHN M WOODBURN
ANTOINETTE FERNANDEZ (STE)...JENNIFER M DANIEL
GEORGE TSEKO (JOHN M WOODBURN)

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

Currently under review by Legal Research.

(LR)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 01/10/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS0800198

CASE NAME: ROSEMARY ESCOBEDO

HEARING:

Accounting Review

COUNSEL:

CHRISTINA ERICKSON-TAUBE (CPE)...SHERRI L KASTILAHN

ROSEMARY ESCOBEDO (CEP)...E JOAN NELMS

JACK B OSBORN (PET)...JACK B OSBORN

CCP170.6 filed as to CYNTHIA LUDVIGSEN

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Christina Erickson-Taube

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

1. Court approved 8th Account Current on 03/22/17 for period ending 10/31/16.
2. Need 9th account current.

RECOMMENDATION

Inquire status

(lh)

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

DATE: 01/10/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600267

CASE NAME: SABRINA A. MOORE

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MICHELLE MOORE

COUNSEL:

MICHELLE MOORE	(CPE)...PRO/PER
TIFFANY MOORE	(CPE)...PRO/PER
SABRINA A MOORE	(CEP)...ROSE C ROSADO

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Michelle Moore (mother) and Tiffany Moore (sister) appointed co-conservators of the person on 06/07/17.
2. **Need** Notification of Conservatee's rights per Pr. C. §1830(c).
3. **Need** a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).
4. **Need** Care Plan in accord with Pr. C. §2352.5.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/10/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700067

CASE NAME: MTR OF SERGIO GAONA ROSAS

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MA CELERINA ROSAS DE GAONA

COUNSEL:

MA CELERINA ROSAS DE GAONA (CPE)...PRO/PER
SERGIO GAONA ROSAS (CTP)...CRAIG M PARKER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Ma Cerlerina Rosas De Gaona, mother, appointed limited conservator of the person.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 12//18/17. **Need proof of service as to appointed Counsel Craig Parker.**
3. Determination of Conservatee's Appropriate Level of Care filed 12/18/17.
4. Care Plan in accord with Pr.C.§2352 filed 12/18/17

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 01/10/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700069

CASE NAME: CHRISTIAN LIGHTER SIAGIAN

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of DAN SIAGIAN

COUNSEL:

DAN SIAGIAN (CP)...PRO/PER
CHRISTIAN LIGHTER SIAGIAN (CTP)...CANDICE A GARCIA-RODRIGO

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Dan Siagian appointed Conservator of the person on 06/07/17.
2. **Need** Notification of Conservatee's rights per Pr. C. §1830(c).
3. **Need** a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).
4. **Need** Care Plan in accord with Pr. C. §2352.5.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 01/10/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700333

CASE NAME: BREANNA REED

HEARING:
Petition for Appointment of Conservator

COUNSEL:
MICHAEL REED (CP)...PRO/PER
LORI KREBS (CP)...PRO/PER
BREANNA REED (CTP)...PRO/PER

x-ref: GARPS1700398 (In re: Awbree Gleason, daughter of conservatee)

GENERAL INFORMATION

Ex parte orders granted 09/12/17. Court appointed Michael Reed and Lori Krebs as temporary co-conservators of the person.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Michael Reed and Lori Krebs (father and step-mother)

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

1. Petitioner seeks medical powers. **Need** Capacity Declaration.
2. **Need** Court Investigator report.
3. **Need** Certificate of Completion of the Conservatorship Training Class.
4. **Need** return of citation.
5. **Need** notice of hearing and proof of service.
6. ~Proposed Form Order: 09/06/17

RECOMMENDATION

Need to clear notes 2-5. If approved, set hearing for Compliance Review for **08/15/18** 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

(lh)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 01/10/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700368

CASE NAME: NATALIE RINGLUND

SEE ALSO 17

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

GLENDA M BAYLESS

(CPE)...WILLIAM J BRUNICK

GERRY D BAYLESS

(CPE)...WILLIAM J BRUNICK

BRETT M BAYLESS

(CPE)...WILLIAM J BRUNICK

NATALIE RINGLUND

(CEP)...JEANNE E KENNEDY

See notes on next matter #17.

(lh)

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

DATE: 01/10/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700368

CASE NAME: NATALIE RINGLUND

SEE ALSO 16

HEARING:

Petition for Appointment of Conservator

COUNSEL:

GLEND A M BAYLESS	(CPE)...WILLIAM J BRUNICK
GERRY D BAYLESS	(CPE)...WILLIAM J BRUNICK
BRETT M BAYLESS	(CPE)...WILLIAM J BRUNICK
NATALIE RINGLUND	(CEP)...JEANNE E KENNEDY

GENERAL INFORMATION

Continued from 11/13/17. Attorney Jeanne Kennedy appointed for Natalie Ringlund. E Joan Nelms appointed as Guardian Ad Litem for Natalie Ringlund.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Glenda Bayless, Gerry Bayless and Brett Bayless, friends

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

1. Petitioners Glenda Bayless, Gerry Bayless and Brett Bayless (friends) seek conservatorship of the person and estate of Natalie Ringlund.
2. Petitioner seeks bond of \$200,000. Appears sufficient. JTD
3. Petitioner seeks medical powers. Capacity Declaration filed 10/12/17.
4. Petition seeks dementia powers. **Need report of Counsel Jeanne Kennedy. GAL Report of E Joan Nelms filed 12/21/17.**
5. Certificate of Completion of the Conservatorship Training Class filed 11/02/17.
6. Court Investigator referral report filed 11/09/17.
7. ~Proposed Form Order: 10/12/17

RECOMMENDATION

Need reports of Counsel.. If approved, set hearing for Compliance Review for **06/18/18** for the filing of the required documents and hearing re Accounting Review for **01/28/19**. Any accounting to be filed 30 days in advance.

(cs/lh)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 01/10/18 TIME: 9:35 DEPT: S37P

CASE#: PRO PS1701087

CASE NAME: TROY INSKEEP SPECIAL NEEDS TRUST

HEARING:

Hearing Re: APPMT OF PUBLIC GUARDIAN AS SUCCESSOR

COUNSEL:

TROY INSKEEP (PET)...MARY M BADER
THE TROY INSKEEP SPECIAL NEEDS TRUST (TRU)...

Waiver of Court Fees and Costs filed by TROY INSKEEP is GRANTED

XREF: PROPS1300386 *MARY ELIZABETH INSKEEP*

Currently under review by Legal Research.

(LR)