



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 01/11/18**

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](mailto: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.

Superior Court of Calif, County of San Bernardino

Page: 1

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

-----  
DATE: 01/11/18 TIME: 8:30 DEPT: S35P  
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CASE#: CIV DS1417071

CASE NAME: JOHNSON VS ST. MARY

HEARING:

Hearing Re: APPROVAL OF SPECIAL NEEDS TRUST (\$2,142,689.97)

COUNSEL:

|                                |                                    |
|--------------------------------|------------------------------------|
| ARNAB BISWAS DO                | (SCHMID & VOILES )..               |
| CHENNA REDDY R MALLU, MD       | (SCHMID & VOILES )..               |
| DANIEL M VILLAROSA MD          | (HULBERT & HULBERT )..             |
| DAVID LEBEAU, M.D.             | (CARROLL, KELLY, TROTTER,          |
| DERRICK N RAPTIS MD            | (PETERSON BRADFORD BURKWITZ        |
| DOE NGUYEN MD                  | ( )...                             |
| FRANCISCO CUELLAR MD           | (BROBECK, WEST, BORGES, ROSA &     |
| JENNY CHANG                    | (PLA)...MICHELS & LEW              |
| LEIF JOHNSON                   | (PLA)...MICHELS & LEW              |
| MALLU C. REDDY M.D             | (SCHMID & VOILES )..               |
| MARK CURRAN MD                 | (BROBECK, WEST, BORGES, ROSA &     |
| MARY BUI DO                    | (SCHMID & VOILES )..               |
| MELVIN CHERNE MD               | MOHAMMAD R AHMADINIA MD (DAVIS,    |
| GRASS, GOLDSTEIN &             | (CARROLL, KELLY, TROTTER,          |
| MOOTHEDATH A MENON MD          | (REBACK, MCANDREWS, KJAR,          |
| MORTEZA SAJADIAN MD            | (LEWIS BRISBOIS BISGAARD & SMIT).. |
| POMONA VALLEY HOSPITAL MEDICAL | (DEF)...BROBECK, WEST, BORGES,     |
| RAIN GRACE JOHNSON             | (M/P)...MICHELS & LEW              |
| RAIN GRACE JOHNSON             | (MIN)...                           |
| RAKESH SINHA MD                | (PETERSON BRADFORD BURKWITZ        |
| RIVERSIDE RADIOLOGY MEDICAL GR | (CARROLL, KELLY, TROTTER,          |
| SHEILA CHERIAN MD              | (SCHMID & VOILES )..               |
| ST. MARY MEDICAL CENTER        | (BROBECK, WEST, BORGES, ROSA &     |
| YUNG-TAE KIM MD                | (BROBECK, WEST, BORGES, ROSA &     |

Currently under review by legal research.

Superior Court of Calif, County of San Bernardino

Page: 2

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

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DATE: 01/11/18 TIME: 8:30 DEPT: S35P  
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CASE#: CIV DS1722271

CASE NAME: TUMANG VS BEAUMONT

HEARING:  
Hearing Re: STATUS OF SERVICE

COUNSEL:

|                               |          |                  |
|-------------------------------|----------|------------------|
| MIMOSA TIU TUMANG             | (PLA)... | ZIPRICK & CRAMER |
| BARBARA A BEAUMONT            | (DEF)... |                  |
| ROBERT WILLIAM HAVEY          | (        | )...             |
| DEBRA M RAYNOR                | (        | )...             |
| NANCY HAVEY                   | (        | )...             |
| ALL PERSONS UNKNOWN, CLAIMING | (        | )...             |

No documents in *probate* civil folder. No notes – JTD

Future Hearing: 05/09/18 Trial setting conference

Superior Court of Calif, County of San Bernardino

Page: 3

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PROBATE**

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DATE: 01/11/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1501012

CASE NAME: CLARISE JD FOREMAN

HEARING:

Hearing re Final Discharge

COUNSEL:

CLARISE JD FOREMAN

(DEC)...

NOREEN T FONTAINE

(TP )...PRO/PER

ROYAL J FOREMAN

(PET)...PRO/PER

#### GENERAL INFORMATION

**Continued from 10/12/17 and 11/30/17. No appearances. Royal Foreman to appear.**

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Petition for Final Distribution for Royal Foreman, son, approved on 12/08/16; order filed 01/19/17.
2. **Need** receipts from Patricia, Clarence, Joseph and Xena Foreman.
3. **Need** Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b).

#### RECOMMENDATION

Inquire status of receipts and discharge.

(lh/lc)

Superior Court of Calif, County of San Bernardino

Page: 4

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

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DATE: 01/11/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600551

CASE NAME: MTR OF DOROTHY M SODARO

HEARING:

WAIVER OF Account and Report of KURT SODARO and Petition for allowance of fees filed.

COUNSEL:

DOROTHY M SODARO (DEC)...  
KURT SODARO (PET)...PRO/PER

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Kurt Sodaro son/trustee.

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

1. All beneficiaries waive accounting.
2. Assets on hand \$255,014.38 of which \$18,014.38 is cash.
3. Administrator seeks statutory compensation of \$8,533.45. Ok.
4. Trust is sole beneficiary of the Will. Trust beneficiaries agree to dissolve Corporation Sodaros Furniture Inc. However, this does not appear to affect the probate administration.
5. ~Proposed Order: 09/28/17.

#### RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **01/17/19**.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 5

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

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DATE: 01/11/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600932

CASE NAME: MTR OF LILY ENRIQUEZ HERNANDEZ

HEARING:  
Accounting Review

COUNSEL:

LILY ENRIQUEZ HERNANDEZ (DEC)...  
RAYLENE CHAVEZ (PET)... GUY A LEEMHUIS  
RAYMOND CHAVEZ (PET)... GUY A LEEMHUIS

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 Ralene and Raymond Chavez, children/sole heirs, on 11/03/16; full authority, no bond.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting or status report.

RECOMMENDATION

Need to clear notes 2-3.  
(lc)

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

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DATE: 01/11/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700053

CASE NAME: MTR OF PHILLIP A KNOX

HEARING:

FIRST AND FINAL Account and Report of LISA MARIE BJORSTROM and  
Petition for allowance of fees filed.

COUNSEL:

LISA MARIE BJORSTROM (PET)...LAILA J KEPLER  
PHILLIP A KNOX (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for  
Allowance of Fees by Lisa Bjorstrom, niece.

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

1. Assets on hand \$399,982.34 all cash.
2. Executor and counsel seek statutory fees of \$11,663.49 each. Ok
3. Executor seeks reimbursement of costs totaling \$2,353.35. [Acct.09/28 LFpg31].
4. Counsel seeks reimbursement of costs totaling \$102.35 for Creditor's Claims paid.
5. Executor seeks a reserve of \$1,500.
6. ~Proposed Order: 09/28/17.

RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **01/17/19**.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 7

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

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DATE: 01/11/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700463

CASE NAME: MTR OF ROBERT WARREN HAVEY

**SEE ALSO 8**

HEARING:

OSC re: Waiver of Petition to Administer by Surviving Spce filed  
by BARBARA A BEAUMONT

COUNSEL:

BARBARA A BEAUMONT (PET)...ALBREKTSON & SHUMATE, LLP  
ROBERT WARREN HAVEY (DEC)...

GENERAL INFORMATION:

**Continued from 09/05/17 and 11/09/17.**

THIS CASE IS SET FOR HEARING ON OSC re Waiver of Petition to Administer by  
Surviving Spouse.

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

1. Matter set on 08/08/17 where Counsel informed the Court that there is a surviving spouse they have been trying to contact; however, unsuccessful. Petition to be served and filed by 08/29/17. Robert Havey ordered to appear.

RECOMMENDATION:

Court's discretion re OSC.

(nb/lc)



Superior Court of Calif, County of San Bernardino

Page: 8

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

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DATE: 01/11/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700463

CASE NAME: MTR OF ROBERT WARREN HAVEY

**SEE ALSO 7**

HEARING: Petition for LETTERS OF ADMINISTRATION WITH FULL  
AUTHORIZATION TO ADMINISTER UNDER IAEA

COUNSEL:

BARBARA A BEAUMONT (PET)...ALBREKTSON & SHUMATE, LLP  
ROBERT WARREN HAVEY (DEC)...

GENERAL INFORMATION

Continued from 08/08/17. Counsel indicates a supplemental has been filed and states his client is seeking limited powers due to adjacent property owner seeking a quiet title. Counsel also informs the Court that there is a surviving spouse they have been trying to contact with no luck. Court orders petition to be served and filed by 08/29/17. Robert Harvey ordered to appear in court. Appearance by CourtCall approved.

**Continued from 09/05/17 and 11/09/17.**

THIS CASE SET FOR HEARING ON Petition for **Ancillary** Letters of Administration with full authority under IAEA by Barbara Beaumont, daughter.

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

1. Petitioner seeks no bond; as there will be an adverse possession claim. Estate value is \$1,000 in real property. Alternatively, petitioner requests limited authority.
2. Petitioner appears to be step-daughter; however; **Supp. (08/07/17)** petitioner alleges she is a child under the Family Code §§7630, 7611(d) and Pr. C. § 6453.
3. Spouse appears to have higher priority; however, no objections or competing petitions filed. Petitioner alleges that spouse has not returned any of her phone calls.
4. Second declaration by Robert Harvey, son, filed stating court should not grant this petition as this property is not owned by decedent; was purchased at auction by himself; is not an asset of this estate; and the petitioner has stated that this parcel of land is the only asset in the estate.
5. **Objection filed** in the form of a declaration by **decedent's son, Robert Havey. Supp. (08/07/17) indicates objections deal with title to property and a contested hearing should not be necessary. Alternatively, the Court could limit Petitioner's powers to some extent so that a contested hearing would not be necessary.**

6. **Third declaration/objection filed by Robert Havey on 10/13/17; which appears to be objection to petition for instructions/property easement issues.**
7. ~Proposed Form Order: 05/12/17.

RECOMMENDATION;

Matter is contested. Court's discretion re bond. If approved, set Accounting/Status Review for **03/14/19**. Any accounting to be filed 30 days in advance local rule 20-901.

Note requirements of local rule 20-908.

(lc/nb/lc)

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

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DATE: 01/11/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700892

CASE NAME: MTR OF THOMAS ALVIN ATKINSON

HEARING:

Hearing Re: AMENDED PET FOR PROBATE OF WILL & LTRS TSTAMENTARY

COUNSEL:

LYNETTE ATKINSON RAMIREZ (PET)...PRO/PER  
THOMAS ALVIN ATKINSON (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Lynette Ramirez, sister/executor.

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

1. Proof of publication filed 01/04/18; however, image not available at time of review.
2. Will waives bond. Net estate value is \$61,441.77 of which \$20.930 is personal property. Court for good cause could require bond per Pr.C. § 8481(b).
3. ~Proposed Form Order: 09/07/17.

#### RECOMMENDATION

RFA subject to note 1, Court's discretion re bond. If approved, set Accounting/Status Review for **03/14/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 10

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

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DATE: 01/11/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1701200

CASE NAME: ESTATE OF NORMAN E. ROETZER

HEARING:

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

COUNSEL:

JOHN H ROETZER (PET)...DAVID A HUFFAKER  
NORMAN E ROETZER (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full  
authority under IAEA by John Roetzer, brother.

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

1. Petitioner seeks bond of \$570,000. Ok.
2. ~Proposed Form Order: 11/30/17.

#### RECOMMENDATION

RFA; \$570,000 bond. If approved, set Accounting/Status Review for **03/14/19**. Any  
accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule  
20-908.

(lc)

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

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DATE: 01/11/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1701203

CASE NAME: ANGELICA B. GARCIA

HEARING:

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

COUNSEL:

ANGELICA B. GARCIA (DEC)...  
STELLA Y. MILLER (PET)...JANIS B. MARTINDALE

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full  
authority under IAEA by Stella Miller, sister.

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

1. All heirs waive bond. Net estate value is \$846,800 of which \$57,400 is personal  
property. Court for good cause could require bond per Pr.C. § 8481(b).
2. Petitioner is nominated by siblings Connie, William and Priscilla.
3. ~Proposed Form Order: 11/20/17.

RECOMMENDATION

RFA, Court's discretion re bond. If approved, set Accounting/Status Review for **03/14/19**.  
Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of  
local rule 20-908.

(lc)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **TRUSTS AND MOTIONS**

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DATE: 01/11/18 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1601032

CASE NAME: MTR OF MADELINE ROSE HOTCH

HEARING:

Motion Re: TERMINATION OF FURTHER PROCEEDINGS AND DISCHARGE OF PERSONAL REPRESENTATIVE Filed by Petitioner KEVIN J MCGEE

COUNSEL:

KEVIN J MCGEE (PET)...THOMAS W DOMINICK  
MADELINE ROSE HOTCH (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Terminate of Further Proceedings and Discharge Pr.C. § 12251 by Kevin McGee, Nephew.

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

1. Letters Testamentary issued to Kevin McGee. Nephew on 11/28/16, full authority no bond.
2. Executor seeks termination on the basis that the only assets that estate received was a coin collection valued at \$5,336.78; no Inventory and Appraisal has been filed. There appears to have been assets at date of death; therefore, estate does not appear to qualify under Pr.C. § 12251. However as the assets are de minimis, Court to require Pr.C. § 13101 affidavit for beneficiary Global Catholic Network.  
**Supp01/03/18: executor intends to secure a Pr.C. § 13101 affidavit.**
3. Executor seeks discharge per Pr.C. § 12251(c).
4. ~Proposed Order: 10/05/17.

#### RECOMMENDATION

Court's discretion.

(lc)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIPS**

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DATE: 01/11/18    TIME: 9:30    DEPT: S35P  
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CASE#: CON PS1300021

CASE NAME: JANE JOLLY

HEARING:

Hearing Re: FINAL DISCHARGE OF NATALIE BLICKENSTAFF

COUNSEL:

|                      |                              |
|----------------------|------------------------------|
| JANE JOLLY           | (CEP)...JAMES B CHURCH       |
| JANE JOLLY           | (CTP)...MARK J. ANDREW FLORY |
| JOHN JOLLY           | (CP )...EDWARD B FISCHEL     |
| JOHN JOLLY           | (CPE)...EDWARD B FISCHEL     |
| MARK J ANDREW FLORY  | (PET)...PRO/PER              |
| MARK J ANDREW OSBORN | (PET)...MARK J. ANDREW FLORY |
| NATALIE BLICKENSTAFF | (CE )...JENNIFER M DANIEL    |
| NATALIE BLICKENSTAFF | (CPE)...JENNIFER M DANIEL    |

**XREF: CONPS1200265** (*William Jolly*)

Discharge order sent to department for signature on 01/04/18.

(lc)

Future Hearing: 12/12/18 Final Discharge re **John Jolly**

Superior Court of Calif, County of San Bernardino

Page: 14

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

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DATE: 01/11/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1400150

***Vacated***

CASE NAME: MTR OF KATHLEEN DURHAM

HEARING:

Hearing Re: RECEIPTS & FINAL DISCHARGE OF LAWRENCE DEAN, II

COUNSEL:

|                                |                            |
|--------------------------------|----------------------------|
| GAIL HAMMER                    | (OBJ)...GEORGE F DICKERMAN |
| JAMES S DURHAM                 | (CPE)...J. DAVID HORSPOOL  |
| JAMES S. DURHAM                | (PET)...EDWARD B FISCHER & |
| KATHLEEN DURHAM                | (CEP)...WALTER T. MOORE    |
| KATHLEEN DURHAM                | (CPE)...KYLE A PATRICK     |
| KATHLEEN DURHAM                | (PRO/PER )...PRO/PER       |
| KATHLEEN DURHAM TRUST DATED 1/ | (TRU)...                   |
| KYLE A. PATRICK                | (PET)...KYLE A PATRICK     |
| LAWRENCE A DEAN II             | (CPE)...SHERRI L KASTILAHN |

***CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN, case reassigned to Judge TARA REILLY for all purposes.***

Future Hearing: 02/07/19 Final Discharge James Durham



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

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DATE: 01/11/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1400361

CASE NAME: MTR OF CAROLE H AKER

HEARING:  
Hearing re Final Discharge

COUNSEL:

|                          |                            |
|--------------------------|----------------------------|
| CAROLE H AKER            | (CEP)...                   |
| CHRISTINA ERICKSON-TAUBE | (CPE)...SHERRI L KASTILAHN |
| KEITH E AKER             | (CPE)...MITCHELL I ROTH    |
| MITCHELL I ROTH          | (PET)...MITCHELL I ROTH    |

GENERAL INFORMATION

**Continued from 11/09/17.**

THIS CASE SET FOR HEARING ON Final Discharge

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

1. Final Account for Christina Erickson Taube, **temporary Conservator**, approved on 04/04/17. However, a second "final" account appears to be filed.
2. **Need** receipt from Christina Erickson Taube as Successor Trustee.
3. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status of receipt and discharge.

(lc)

Future Hearing: 11/15/18 *Accounting Review re Trust **Christina Erickson Taube***

Superior Court of Calif, County of San Bernardino

Page: 16

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

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DATE: 01/11/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1500363

CASE NAME: CHARLENE MAYER AKA CHARLENE D. MAYER ETC

HEARING:

Hearing Re: STATUS OF BLOCKED ACCOUNT

COUNSEL:

|                |                                 |
|----------------|---------------------------------|
| CHARLENE MAYER | (CEP)...WALTER T. MOORE         |
| MELODY BRAVO   | (CPE)...ELISABETH KEMPE-OLINGER |
| TIMOTHY MAYER  | (CPE)...ELISABETH KEMPE-OLINGER |

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status of Blocked Account

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

1. On 11/09/17, Sale of Real property for Timothy Mayer and Melody Bravo, Conservators/children, was granted and all proceeds except \$70,000 were ordered deposited into blocked account.
2. Receipt and acknowledgement filed indicating assets blocked of \$229,784.72. Court to clarify amount as there is no copy of escrow statement.

RECOMMENDATION

Court's discretion.

(lc)

Future Hearing: 06/07/18 *Accounting Review.*

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

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DATE: 01/11/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700433  
CASE NAME: MTR OF HUGO A. UGARTE

HEARING: Petition for Appointment of Conservator

COUNSEL:

HUGO A UGARTE (CTP)...  
MARIO UGARTE (CP)...PRO/PER  
SILVANA SOLIS (CP)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Silvana Solis and Mario Ugarte, parents.

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

1. Petitioners seek powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
2. Petitioners seek civil rights not be limited without court order. JTD
3. Petitioners seek medical powers. Capacity Declaration filed 11/29/17.
4. Proposed conservatee is developmentally disabled. **Need** appointment of counsel for report.
5. Proposed conservatee is developmentally disabled. **Need** IRC report.
6. Section 11 of petition is missing sibling Brigitte. **Need** verified supplement.
7. **Need** return of citation.
8. **Need updated** list of required contacts (Local form SB-12224) to include siblings Carolina, Javier and Genesis.
9. **Need** Certificates of Completion of the Conservatorship Training Class.
10. **Need** notice of hearing and proof of service including 30 days' notice to IRC per Pr.C. § 1822(e).
11. **Need** Court Investigator report.
12. ~Proposed Form Order: 11/29/17.

RECOMMENDATION

Need to clear notes 4-11. If approved, set hearing for Compliance Review for **08/16/18** 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.

(lc)

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

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DATE: 01/11/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700441  
CASE NAME: MTR OF SERGIO HERNANDEZ  
HEARING: Petition for Appointment of Conservator

COUNSEL:

JOSE D HERNANDEZ (CP)...PRO/PER  
SERGIO HERNANDEZ (CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Jose Hernandez, father.

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

1. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner does not list himself in relatives section; however, it's obvious he is father.
4. Petitioner seeks medical powers. **Need** Capacity Declaration.
5. Proposed conservatee is developmentally disabled. **Need** appointment of counsel for report.
6. Proposed conservatee is developmentally disabled. **Need** IRC report. IRC requested a 45 day continuance on 12/19/17.
7. **Need** return of citation.
8. **Need** list of required contacts (Local form SB-12224).
9. **Need** Certificate of Completion of the Conservatorship Training Class.
10. Notice filed 12/15/17; however, proof of service does not indicate a copy of petition was filed per Pr.C. §1822.
11. Court Investigator report filed 01/02/18.
12. ~Proposed Form Order: 11/28/17.

RECOMMENDATION

Need to clear notes 4-9. If approved, set hearing for Compliance Review for **08/16/18** 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.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 19

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**MISC**

-----  
DATE: 01/11/18    TIME: 1:30    DEPT: S35P  
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CASE#: PRO PS1600911

CASE NAME: THERESA AILEEN CORTEZ LIVING TRUST

HEARING:

Hearing Re: COURT TRIAL (FOURTH DAY OF TRIAL)

COUNSEL:

BRENDA SIERDSMA

(PET)...WEINSTOCK MANION

PAUL VANDEN PIERCE

(OBJ)... LAYNE A BARTHOLOMEW

THERESA AILE EN CORTEZ LI VING (TRU)...

Trial – No notes – JTD

Future Hearing: 01/12/18 *Court Trial*

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **Readiness Calendar**

-----  
DATE: 01/11/18 TIME: 8:30 DEPT: S36P  
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CASE#: CON PS1300026

CASE NAME: CHERI LYNN AUCOIN

**SEE ALSO 2**

HEARING: Petition for APPOINTMENT OF SUCCESSOR CONSERVATOR OF THE PERSON, LIMITED CONSERVATORSHIP

COUNSEL:

|                                |                        |
|--------------------------------|------------------------|
| CHERI CLAYTON                  | (CP )...PRO/PER        |
| CHERI LYNN AUCOIN              | (CEP)...ROSE C ROSADO  |
| CHERI LYNN AUCOIN              | (CTP)...ROSE C ROSADO  |
| DIRECTOR, DEPARTMENT OF DEVELO | (CP )...DEPARTMENT OF  |
| PUBLIC GUARDIAN                | (CP )...COUNTY COUNSEL |

GENERAL INFORMATION

Continued from 06/21/17. Public guardian relieved as the temporary guardian. Department of Developmental Service appointed successor temporary guardian of Cheri Aucoin.

**Continued from 08/14/17. Matter is contested and set for trial.**

THIS CASE SET FOR HEARING ON Petition for **Successor** Appointment of Limited Conservator person only by Department of Developmental Services.

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

1. Cheri Clayton, mother, was prior limited Conservator of person only. Public Guardian was appointed temporary successor conservator on 10/24/16. Conservatee nominated petitioner as successor Conservator.
2. Petitioner seeks medical powers. Updated Capacity Declaration filed on 04/10/17; however, is not dated by physician, nor is section 5 completed as to ability to attend hearing. Does court wish to require a corrected form as capacity has already been determined by current conservatorship? JTD
3. Proposed conservatee is developmentally disabled. Report of appointed Counsel filed 06/15/17.
4. Proposed conservatee is developmentally disabled. IRC report filed 06/19/17.
5. Report of Craig Parker (GAL) filed 07/19/17.
6. Letter from DDS filed 06/13/17.
7. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
8. Petitioner seeks civil rights not be limited without court order. JTD

9. Due diligence declaration filed 05/01/17 as to Father and half siblings. JTD
10. Court Investigator memo filed 04/05/17.
11. **Need Confidential Supplemental Information.**
12. **Objection in the form of a Declaration by Cheri Clayton filed 07/07/17. Need proof of service.**
13. ~Proposed Form Order: 04/10/17.

#### RECOMMENDATION

Need to clear note 11, then Court's discretion. If approved, set hearing for Compliance Review for **08/16/18** 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 and Inventory & Appraisal with notice.  
(lc/lh/lc)

Future Hearing:

*01/22/18 Court Trial*

*01/22/18 Petition for appointment of successor conservator etc.*

Superior Court of Calif, County of San Bernardino

Page: 2

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

-----  
DATE: 01/11/18 TIME: 8:30 DEPT: S36P  
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CASE#: CON PS1300026

CASE NAME: CHERI LYNN AUCOIN

**SEE ALSO 1**

HEARING:  
Readiness Calendar

COUNSEL:

|                                |                        |
|--------------------------------|------------------------|
| CHERI CLAYTON                  | (CP )...PRO/PER        |
| CHERI LYNN AUCOIN              | (CEP)...ROSE C ROSADO  |
| CHERI LYNN AUCOIN              | (CTP)...ROSE C ROSADO  |
| DIRECTOR, DEPARTMENT OF DEVELO | (CP )...DEPARTMENT OF  |
| PUBLIC GUARDIAN                | (CP )...COUNTY COUNSEL |

Readiness – No notes – JTD

Future Hearing:  
*01/22/18 Court Trial*  
*01/22/18 Petition for appointment of successor conservator etc.*



Superior Court of Calif, County of San Bernardino

Page: 3

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**PROBATE**

-----  
DATE: 01/11/18      TIME: 8:30      DEPT: S36P  
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CASE#: PRO DS1000194

CASE NAME: WALTER EARL GREENWOOD

HEARING:

Hearing re Final Discharge

COUNSEL:

CARL GREENWOOD                      (PET)...GATEWAY LEGAL GROUP, P.C  
MARLA L GREENWOOD                (PET)...GATEWAY LEGAL GROUP, P.C  
WALTER EARL GREENWOOD        (DEC)...

***XREF: CIVDS1205220 (Greenwood v LaCues), SCVSS261126 (Aguilar v Calnev Pipeline)***

#### GENERAL INFORMATION

Continued from 06/08/17, 07/20/17 and 08/31/17. No appearances. Court imposed sanctions of \$50 each on Carl and Marla Greenwood; Gateway Legal group to be payable by 08/31/17. Sanctions imposed of \$50 on 07/20/17 not paid.

OSC Continued from 10/19/17. No appearance. Counsel to be present.

**Continued from 11/30/17 OSC. No appearance.**

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Carl Greenwood, son, approved on 06/02/16.
2. **Need** receipts for Walter and Charles Greenwood for civil judgment.
3. **Need** Ex Parte Petition for Final Discharge and Order.

#### RECOMMENDATION

Inquire status of receipts and discharge. No bonding company to notice.  
(lc/ww/lc)

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

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DATE: 01/11/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS0800814

CASE NAME: MTR OF ELMER VERL MITCHELL

HEARING:

Hearing re Final Discharge

COUNSEL:

|                      |                              |
|----------------------|------------------------------|
| BRUCE R DURKEE       | (PET)...BRUCE R DURKEE       |
| ELMER V MITCHELL     | (DEC)...                     |
| PATRICK B WRIGHT     | (TP )...PRO/PER              |
| PUBLIC ADMINISTRATOR | (PET)...CRAIG PARKER         |
| SUZUNN E MITCHELL    | (PET)...E. JOAN NELMS        |
| SUZUNN E MITCHELL    | (PET)...MARK J. ANDREW FLORY |

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final Distribution for Suzann Elizabeth-Mitchell approved on 01/05/17. **Need** order with corrections.
2. Personal representative is sole beneficiary, no receipt required.
3. **Need** Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b) once order for final distribution is approved.

RECOMMENDATION

Inquire status of orders.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 5

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

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DATE: 01/11/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1100294

CASE NAME: MARY ROBERTA BURDICK

HEARING:  
Accounting Review

COUNSEL:

EARL SPENCER BURDICK (PET)...PRO/PER  
MARY ROBERTA BURDICK (DEC)...  
ROBERTA ROSE BURDICK (PET)... NOREEN T FONTAIN

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting review.

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

1. Corrected Letters of administration issued to Roberta Burdick, daughter, on 04/18/17; limited authority \$20,000 bond.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting or status report.

RECOMMENDATION:

Inquire status of Inventory and Appraisal and accounting.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 6

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

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DATE: 01/11/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1300056

CASE NAME: THE DOROTHY FAYE GOFORTH SPECIAL NEEDS TRUST

HEARING:  
Accounting Review

COUNSEL:

DOROTHY FAYE GOFORTH (BEN)...E. JOAN NELMS  
MARY L MANNING (PET)...DENNIS M SANDOVAL  
THE DOROTHY FAY GOFORTH SPECIA (TRU)...

GENERAL INFORMATION  
**Continued from 11/02/17.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 2<sup>nd</sup> SNT Account for Mary Manning, Trustee, approved on 02/25/16.
2. **Need** 3<sup>rd</sup> Account beginning with 08/31/15.

RECOMMENDATION  
Inquire status of accounting.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 7

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

-----  
DATE: 01/11/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1500865

CASE NAME: Rudy Sudol

HEARING:  
Accounting Review

COUNSEL:

|                     |                 |
|---------------------|-----------------|
| JENNIFER REID       | (PET)...PRO/PER |
| RUDY SUDOL          | (DEC)...        |
| VANESSA TAGHVATALAB | (PET)...PRO/PER |

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 Jennifer Reid, granddaughter, on 10/27/16; full authority, no bond.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting or status report.

RECOMMENDATION

Need to clear notes 2-3.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 8

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

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DATE: 01/11/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600356

CASE NAME: ROBERT C FRANKS

HEARING:

Waiver of Account and Report of MICHAEL R FRANKS and Petition  
for allowance of fees filed.

COUNSEL:

MICHAEL R FRANKS (PET)...ELISABETH KEMPE-OLINGER  
ROBERT C. FRANKS (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Michael Franks, son.

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

1. Both beneficiaries waive accounting.
2. Assets on hand \$373,150.25 in cash.
3. Attorney seeks extraordinary fees of \$2,535 for 7.8 hours related to sale of real property. [Acct. 10/03/17 LFpg13-16]. JTD
4. Executor and attorney seek statutory fees of \$11,617.10. Ok.
5. Parties agree that executor will receive two vehicles.
6. Executor seeks a reserve of \$2,000.
7. ~Proposed Order: 10/03/17.

#### RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **01/17/19**.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 9

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

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DATE: 01/11/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600960

***Vacated***

CASE NAME: MTR OF THOMAS R MEYER

HEARING:  
Accounting Review

COUNSEL:  
DORIS NEWBERGER (PET)...PRO/PER  
THOMAS R MEYER (DEC)...

(lc)

Future hearing dates: 01/24/18 waiver of final accounting/distribution by Doris Newberger.

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

-----  
DATE: 01/11/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1700056

CASE NAME: MTR OF JOHN ADAM STRADTNER

HEARING: PETITION FOR FINAL DISTRIBUTION ON WAIVER OF Account and Report of HAROLD W BENEDICT and Petition for allowance of fees filed.

COUNSEL:

HAROLD W BENEDICT (PET)...PRO/PER  
JOHN ADAM STRADTNER (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Harold Benedict, nominee.

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

1. Assets on hand \$166,092.77 in cash, securities and stock.
2. Sole heir, Hester Benedict/sister, waives accounting.
3. Administrator waives statutory compensation.
4. It appears a Creditor's Claim by administrator was submitted on 06/15/17; however, court did not appear to allow or reject. Part of the claim appears to be for funeral expenses and the rest for administrative expenses. Only claims incurred prior to decedent's death, with the exception of funeral and last illness related costs, will be allowed. It appears that a majority of the claim consists of costs of administration, which may be allowed under Probate Code§10556(b). JTD
5. Administrator seeks a reserve of \$1,000.
6. ~Proposed Order: 11/08/17.

RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **01/17/19**.

(lc)



Superior Court of Calif, County of San Bernardino

Page: 11

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

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DATE: 01/11/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700982

CASE NAME: LOIS ELAINE BURNS

HEARING:

Petition to determine succession to Real Property

COUNSEL:

LOIS ELAINE BURNS (DEC)...  
LYNN SMITH (PET)...ELISABETH KEMPE-OLINGER

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Lynn Smith.

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

1. Petitioner, Lynn Smith, is administrator for the Estate of Richard Burns PROPS1700541.
2. Petitioner seeks 100% interest in decedent's 50% interest in real property by assignments of interest.
3. ~Proposed Form Order: 10/03/17.

#### RECOMMENDATION

RFA.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 12

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

-----  
DATE: 01/11/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1701026

CASE NAME: MTR OF DANIEL RAY SALSBERY

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL AUTHORIZATION  
TO ADMINISTER UNDER IAEA

COUNSEL:

DALE A SALISBURY (PET)...HORSPPOOL & HORSPPOOL  
DANIEL RAY SALSBERY (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Dale Salisbury, brother.

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

1. Petitioner seeks bond of \$400,000. Ok.
2. Section 3 indicates decedent's residence was San Luis Obispo County at time of death. Court to clarify if decedent was domiciled in San Bernardino County Pr.C. § 7051.
3. ~Proposed Form Order: 10/12/17.

#### RECOMMENDATION

RFA subject to note 2, \$400,000 bond. If approved, set Accounting/Status Review for **03/21/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

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

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DATE: 01/11/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1701146

CASE NAME: IAN ANDREW MCCRUDDEN

HEARING:

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

COUNSEL:

|                      |          |                 |
|----------------------|----------|-----------------|
| ELIDA MCCRUDDEN      | (PET)... | DAVID PHILIPSON |
| IAN ANDREW MCCRUDDEN | (DEC)... |                 |
| NELLIE S HOLLIDAY    | (PET)... | DAVID PHILIPSON |

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Nellie Holliday and Elida McCrudden, mother and sister.

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

1. All heirs waive bond. **Need** bond waivers for children Jon, Joel and Emily. Net estate value is \$125,000 of which \$50,000 is personal property.
2. **Need** proof of publication.
3. ~Proposed Form Order: 11/03/17.

RECOMMENDATION

Need to clear notes 1-2, Court's discretion re bond. If approved, set Accounting/Status Review for **03/21/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

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

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DATE: 01/11/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1701204

CASE NAME: RICHARD R. HOOVER AKA RICHARD RALEIGH HOOVER

HEARING:

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

COUNSEL:

|                   |                          |
|-------------------|--------------------------|
| RICHARD E. HOOVER | (PET)...DEBRA S POPINEAU |
| RICHARD R. HOOVER | (DEC)...                 |
| TRACY SHERWOOD    | (PET)...DEBRA S POPINEAU |

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Richard Hoover and Tracy Sherwood, children.

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

1. Petitioners seek bond of \$313,585. Ok.
2. **Need** proof of publication.
3. ~Proposed Form Order: 11/20/17.

RECOMMENDATION

Need to clear note 2, \$313,585 bond. If approved, set Accounting/Status Review for **03/21/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 15

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

-----  
DATE: 01/11/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1701205

CASE NAME: ESTATE OF PATRICIA L. JOHNSON

HEARING:

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

COUNSEL:

JAMES MASTERS (PET)...RICHARD F NEVINS  
PATRICIA L JOHNSON (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full  
authority under IAEA by James Masters, brother.

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

1. Petitioner seeks bond of \$283,000. Ok
2. ~Proposed Form Order: 12/01/17.

#### RECOMMENDATION

RFA, \$283,000 bond. If approved, set Accounting/Status Review for **03/21/19**. Any  
accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule  
20-908.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 16

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **TRUSTS AND MOTIONS**

-----  
DATE: 01/11/18 TIME: 8:35 DEPT: S36P  
-----

CASE#: PRO PS1200565

CASE NAME: JAYDEN ARIAS SETTLEMENT TRUST

HEARING:

PETITION FOR APPROVAL OF SIXTH Account and Report of WESTAMERICA BANK and Petition for allowance of fees filed.

COUNSEL:

JAYDEN ARIAS SETTLEMENT TRUST (TRU)...  
WESTAMERICA BANK (PET)...RANDOLPH M SHARON  
WESTAMERICA BANK (TEE)...RANDOLPH M SHARON

**X-REF: CIVDS 1004389** (*Arias v Community Hospital*)

GENERAL INFORMATION:

**Continued from 11/30/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON 6<sup>th</sup> Account Current and Petition for Fees by Westamerica Bank, Trustee.

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

1. Accounting covers 08/01/16 – 07/31/17.
2. Assets on Hand: \$404,291.26 consisting of \$3,049.33 in cash, balance in real property and mutual funds.
3. Trustee requests ratification of fees already taken in amount of \$8,346.03 in accordance with terms of prior court order.
4. Attorney seeks fees of \$3,300, reduced from \$4,150 and reimbursement of costs of \$465. JTD
5. **If** beneficiary receives services from Director of Developmental Services, need notice C.R.C 7.903(c)(6), Pr.C. § 2621.
6. Report of GAL Joan Nelms filed 11/30/17.
7. No proposed order. Submit order after hearing.

RECOMMENDATION:

Court's discretion re fees and note 5. If approved, set Accounting/Status Review for **11/08/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATOSHIPS**

-----  
DATE: 01/11/18      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS0900204

CASE NAME: KYLE SCHUNKE

HEARING:

Accounting Review

COUNSEL:

|                      |                             |
|----------------------|-----------------------------|
| ANGELO SCHUNKE       | (OBJ)...DONNASUE ORTIZ      |
| ANGELO SCHUNKE       | (PET)...DONNASUE ORTIZ      |
| ANGELO SCHUNKE       | (PET)...SAMUEL R WASSERSON  |
| E. JOAN NELMS        | (PET)...E JOAN NELMS        |
| J DAVID HORSPOOL     | (PET)...J. DAVID HORSPOOL   |
| KYLE SCHUNKE         | (CEP)...JOAN NELMS          |
| KYLE SCHUNKE         | (PET)...JACK B. OSBORN      |
| NANCY SLIMAK SCHUNKE | (CPE)...HORSPOOL & HORSPOOL |

GENERAL INFORMATION

**Continued from 10/19/17.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 6<sup>th</sup> Account of Angelo Schunke, father, approved on 07/03/17.
2. **Need** 7<sup>th</sup> Account beginning with 08/01/16.

RECOMMENDATION

Inquire status of accounting.

(lc)

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

-----  
DATE: 01/11/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1100285

CASE NAME: GILBERT E. MADRID

**SEE ALSO 18A**

HEARING: FOURTH Account and Report of GILBERT MADRID and Petition for allowance of fees filed.

COUNSEL:

|                  |                              |
|------------------|------------------------------|
| GILBERT E MADRID | (CEP)...MITCHELL I ROTH      |
| GILBERT MADRID   | (CPE)...DAVID M GROSSMAN     |
| MITCHELL I. ROTH | (CPE)...MITCHELL I ROTH      |
| W. A. HLAVATY    | (SC )...RICHARD W S PERSHING |

GENERAL INFORMATION

Continued from **07/06/17 and 07/13/17**. Gilbert Madrid to pay \$72 overdraft fees and get his rent up to date. Rent is payable monthly on the 15<sup>th</sup>. Declaration to be filed as to payments made. Gilbert Madrid suspended as Conservator and trustee on 07/27/17. **Continued from 08/31/17, 10/12/17 and 12/07/17.**

THIS CASE SET FOR HEARING ON 4<sup>th</sup> Account Current and Petition for Allowance of Fees by Gilbert Madrid, son.

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

1. Accounting period 07/03/15 – 01/05/17.
2. Assets on hand \$369,873.76 of which \$73,614.03 is cash and remainder in investment accounts. **Supp 10/12: amended** cash amount is \$68,658.88; however, no amended accounting submitted. **Need** same.
3. No request for fees made.
4. Disbursements indicate two overdraft fees totaling \$72.00. Petitioner has since deposited his own funds to prevent a reoccurrence.
5. Charges are not totaled and appear to total as \$424,421.79 which is off from the Credits of \$408,502.76. **Need** accounting that balances.
6. Prayer is incomplete and does not match report for items 2 & 4 re balance and fee request. **Supp 07/03/17 indicates assets of \$408,502.76; however, the assets are incorrect.**
7. Supplemental report of Counsel Roth filed 05/31/17.
8. Declaration filed **07/27/17** indicating \$45,000. \$17,000 and \$72 deposit into conservatee's account.



9. **Objections filed by conservatee through counsel on 05/02/17. Need** proof of service for bonding company.
10. No proposed order. Submit after hearing.

#### RECOMMENDATION

Need to clear notes 2, 5-6 & 9. If approved, set hearing on the next accounting review for **04/11/18** (if one year) or **04/10/19** (if two years). Accounting to be filed 30 days in advance.

(lc/lh/lc)

Superior Court of Calif, County of San Bernardino

Page: 18A ADD ON

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

-----  
DATE: 01/11/18 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1100285

CASE NAME: GILBERT E. MADRID

**SEE ALSO 18**

HEARING:

OSC re: Suspension/Removal of Conservator filed by GILBERT MADRID

COUNSEL:

|                  |                              |
|------------------|------------------------------|
| GILBERT E MADRID | (CEP)...MITCHELL I ROTH      |
| GILBERT MADRID   | (CPE)...DAVID M GROSSMAN     |
| MITCHELL I. ROTH | (CPE)...MITCHELL I ROTH      |
| W. A. HLAVATY    | (SC )...RICHARD W S PERSHING |

GENERAL INFORMATION

**OSC continued from 08/31/17** at request of counsel to submit report of W.A. Hlavaty.  
Notice waived.

**Continued from 10/12/17 and 12/07/17.**

THIS CASE SET FOR HEARING ON OSC re Suspension/Removal of Conservator.

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

1. OSC set on 07/27/17. Gilbert Madrid was suspended as the trustee of the trust and as conservator of the estate. W A Hlavaty is appointed successor interim trustee and conservator of the estate. Court ordered no payments be made other than the facility bills from the trust or the conservatorship accounts. W A Hlavaty to personally be present and submit a report on the 08/31/17 hearing.
2. **Declaration which appears to be a report of efforts to Marshal conservatorship and Trust Assets filed by W.A. Hlavaty 12/01/17.**

RECOMMENDATION

Court's discretion re OSC.

(lc/lh/lc)

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

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DATE: 01/11/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1200150  
CASE NAME: MTR OF DOLORES DELGADILLO  
HEARING: Hearing re Final Discharge

COUNSEL:

D. HERSHEL WILSON (PET)...  
DAVID HERMAN (CPE)...  
DOLORES DELGADILLO (CEP)...HARTNELL LAW GROUP  
PEARL WARDLOW (CPE)...KELLY L PEXTON  
PEARL WARDLOW (OBJ)...KELLY L. PEXTON, ESQ  
U.S. SPECIALTY INSURANCE COMP (LANAK & HANNA

GENERAL INFORMATION

Continued from 10/06/16 and 12/15/16. Court orally amended 2<sup>nd</sup> account that the vehicle can be distributed to Pearl Wardlow as she is sole heir.

Continued from 02/09/17. Second account approved as amended. Counsel to submit order after hearing.

OSC set on 04/20/17 when there was no appearance. Attorney Kelly Pexton to personally be present.

OSC continued from 05/25/17. Court imposed sanctions of \$500; as Attorney Kelly Pexton failed to appear/comply. Attorney Pexton and Pearl Wardlow to appear.

**Continued from 07/27/17 OSC vacated and 11/09/17.**

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. 2<sup>nd</sup> and Final Account of Pearl Wardlow was granted on 10/06/15; Court orally amended 2<sup>nd</sup> account that the vehicle can be distributed to Pearl Wardlow as she is sole heir. Order returned for corrections on 08/14/17. **Need proper order for second account indicating distribution, assets on hand etc.**
2. No receipts needed as Pearl Wardlow is sole heir.
3. **Need** Ex Parte Petition for Final Discharge and Order with **county recording** information per Pr.C.§11753(b) once the above order is approved.

RECOMMENDATION

Need to clear notes 1 & 3.

(lc/ww/lc)

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

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DATE: 01/11/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1500276

CASE NAME: MTR OF JUNE N ROBINSON

HEARING:  
Accounting Review

COUNSEL:

|                    |                                 |
|--------------------|---------------------------------|
| ANGELA M PARR      | (CEP)...CHRISTOPHER E OVERGAARD |
| CECILIA E ROBINSON | (CPE)...CHRISTOPHER E OVERGAARD |
| JUNE N ROBINSON    | (CEP)...PRO/PER                 |
| JUNE N ROBINSON    | (PCE)...JAMES B CHURCH          |
| WESLEY A ROBINSON  | (CPE)...CHRISTOPHER E OVERGAARD |

**XREF: PROPS1700745** (*Estate of June N Robinson*)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review

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

1. Wesley Robinson, spouse, appointed Conservator of person and estate on 07/02/12 in Los Angeles. Matter transferred to San Bernardino and amended letters issued 03/17/16; current bond \$48,000. Wesley passed away on 06/11/17.
2. Final Inventory and Appraisal filed 08/18/12.
3. **Need** accounting for deceased Conservator. Court may wish to require counsel to file accounting per Pr.C. § 2632.

RECOMMENDATION

Inquire status of accounting.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 21

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

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DATE: 01/11/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700094

CASE NAME: MANUEL ARELLANO MURRAY  
HEARING: Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of DAVID MURRAY

COUNSEL:

DAVID MURRAY (CPE)...PRO/PER  
MANUEL ARELLANO MURRAY (CEP)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. David Murray, nephew, appointed conservator of the person and estate on 08/17/17, \$50,000 bond.
2. **Need** proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's rights per Pr.C.§1830(c).
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5, local rule 20-1403.
5. **Need** final Inventory & Appraisal per Pr.C.§2610.
6. **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
7. **If** the conservatorship estate holds interest in real property, need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313.

RECOMMENDATION

Need to clear notes 2-7.

Future Hearing: 10/25/18 *Accounting Review*.

Superior Court of Calif, County of San Bernardino

Page: 22

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

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DATE: 01/11/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700335

CASE NAME: MTR OF TERESA DEL C MORALES

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CYNTHIA C ARRIAGADA (CP)...PRO/PER  
TERESA DEL C MORALES (CTP)...CRAIG M PARKER

#### GENERAL INFORMATION

Temporary orders denied on 09/19/17. Craig Parker appointed counsel.

**Continued from 10/19/17 and 11/30/17. Report filed, need Capacity Declaration.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Cynthia Arriagada, daughter.

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

1. Petitioner seeks dementia powers. Report of Counsel Craig Parker filed 11/30/17.
2. Petitioner seeks medical powers. Capacity Declaration filed 12/18/17.
3. Citation served; however, was served 7 days prior to 10/19/17 last hearing. **Need** full 15 days' service.
4. Court Investigator report filed 10/16/17.
5. Certificate of Completion of the Conservatorship Training Class filed 10/16/17.
6. ~Proposed Form Order: 09/07/17

#### RECOMMENDATION

Need to clear note 3. If approved, set hearing for Compliance Review for **08/16/18** 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/lc)

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

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DATE: 01/11/18 TIME: 9:30 DEPT: S36P  
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CASE#: SC SS01236

CASE NAME: IN THE MATTER OF JEREMY KEN PUGEL

HEARING:

Hearing Re: Status of Jeremy Ken Pugel/Co-conservator

COUNSEL:

|                    |                         |
|--------------------|-------------------------|
| ANDREA WILLIS      | (PET)...PRO/PER         |
| JEREMY KEN PUGEL   | (CEP)...MITCHELL I ROTH |
| JOSEPH EARLS       | (PET)...PRO/PER         |
| VIRGIE LEE EARLS S | (CPE)...PRO/PER         |

***XREFPROPS1700222*** (Joseph Richard Earls)

GENERAL INFORMATION

Matter set on 01/20/17 after review of Court Investigator memo. Mitchell Roth appointed counsel. IRC directed to provide a report. Court Investigator also notified.

Continued from 02/09/17. Court noted that the order/letters from 2008 are not correct. Amended order/letters to be submitted. Counsel also to address the conservatee's eligibility to vote.

**Continued from 04/06/17, 05/11/17 and 07/13/17 to submit amended order/letters.**

THIS CASE SET FOR HEARING ON Status of conservatee/Co-Conservator.

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

1. Co-Conservator Joseph Earls, grandfather, passed away leaving mother Andrea Willis, mother, as sole Conservator of person only. ***Need amended order/letters to reflect Andrea only.***
2. Report of Counsel Mitchell Roth filed 06/01/17.
3. Court Investigator reports filed 01/30/17 and 04/18/17.
4. IRC report filed 02/07/17.

RECOMMENDATION

Need amended order/letters.

(lc/lh/lc)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO San Bernardino District - Civil  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

## Readiness Calendar

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DATE: 01/11/18 TIME: 8:29 DEPT: S37P  
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CASE#: CIF DS1600075

CASE NAME: ARCINIEGA VS RAMIREZ

HEARING:  
Readiness Calendar

### COUNSEL:

VIRGINIA TAPIA ARCINIEGA (PP )...TETLEY LAW OFFICES  
DEBRA JEANNE RAMIREZ (RP )... JOHN SETLICH  
SALATHIEL RAMIREZ ( )...

### ***JUDGE WELCH RECUSES HIMSELF FOR ALL PURPOSES***

Readiness – No notes – JTD



Superior Court of Calif, County of San Bernardino

Page: 2

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

-----  
DATE: 01/11/18 TIME: 8:29 DEPT: S37P  
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CASE#: CIF DS1600076

CASE NAME: ARCINIEGA VS RAMIREZ

HEARING:  
Readiness Calendar

COUNSEL:  
SALATHIEL RAMIREZ (RP)... JOHN SETLICH  
VIRGINIA TAPIA ARCINIEGA (PP)...FRANK O TETLEY

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

***JUDGE WELCH RECUSES HIMSELF FOR ALL PURPOSES***

Readiness – No notes – JTD

Superior Court of Calif, County of San Bernardino

Page: 3

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

-----  
DATE: 01/11/18 TIME: 8:29 DEPT: S37P  
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CASE#: CIV DS1614969

CASE NAME: ARCINIEGA-V-RAMIREZ

HEARING:  
Readiness Calendar

COUNSEL:  
DEBRA JEANNE RAMIREZ (DEF)... JOHN SETLICH  
VIRGINIA TAPIA ARCINIEGA (PLA)...TETLEY LAW OFFICES

***JUDGE WELCH RECUSES HIMSELF FOR ALL PURPOSES***

Readiness – No notes – JTD

Superior Court of Calif, County of San Bernardino

Page: 4

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

-----  
DATE: 01/11/18 TIME: 8:29 DEPT: S37P  
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CASE#: GAR PS1700096

CASE NAME: MTR OF ELAINE LILLIAN CASTANEDA

HEARING:  
Readiness Calendar

COUNSEL:  
ELAINE LILLIAN CASTANEDA (MIN)...  
TERESA LOPEZ (PET)...PRO/PER

Readiness – No notes – JTD

Superior Court of Calif, County of San Bernardino

Page: 5

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

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DATE: 01/11/18 TIME: 8:29 DEPT: S37P  
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CASE#: GAR PS1700158  
CASE NAME: LILLIAN NGUYEN

**SEE ALSO 6**

HEARING: Hearing re: Petition for Appointment of Guardian

COUNSEL:

LILLIAN NGUYEN (MIN)...PRO/PER  
MABLE KUENNIGER (PET)...PRO/PER

**XREF: GARSS800050** (*Savanna Lanee Espinosa*)

GENERAL INFORMATION:

Temporary Orders granted on 04/10/17. Mable Kuenniger is appointed Temporary Guardian of the person of Lilian Nguyen.

**Continued from 05/10/17.** Father deemed by appearance. Petitioner to have mother sign a waiver of notice and consent to guardianship. Father to provide petitioner with address information for his parents so petitioner can serve paternal grandparents. Notice needs to be given to Savannah, and a Declaration of Due Diligence to be filed as to maternal grandfather. Referred to Court Investigator for report.

Continued form **09/20/17.** Court orders this case and **GARSS800050** be heard together as related actions. Court Investigator reports petitioner has not cooperated in preparation of report. It is further reported Matthew (alleged substance abuser) is residing in the home. Temporary orders made on 04/10/17 are vacated. Letters revoked Mitchell Roth appointed GAL as to Savannah Espinosa and Lillian Nguyen. GAL to speak with DCFS social worked and make a report to DCFS if appropriate.

**Continued from 10/25/17 for report/meet with minors. Mother is doing well and has no objection to visitations. Mother to have supervised visitation by Jennifer Harper up to 12 hours a week arranged by all parties/supervisor.**

**Continued from 12/07/17. Trial set. Mitchell Roth to prepare order requesting release of Matthew's probation report. Court Investigator recommends deny guardianship.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Guardian, of the person only, by Mable Kuenniger (maternal grandmother), minor: Lilian, 3

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

1. Jennifer Ellis, mother, signed Nomination, Consent and Waiver filed 08/04/17.
2. Notice of Hearing and proof of service filed as to Peter Nguyen, father, and Savannah, sibling; and Mr. and Mrs. John Nguyen on 09/07/17.

- a. Notice does not list what type of petition was filed in section 1. **Need** corrected notice.
- b. **Need** individual service as to paternal grandparents.
3. **Need** Due Diligence Declaration as to maternal grandfather.
4. **Need** verified supplement. Child Information Attachment is incomplete as to section 2 re names and addresses of all relatives, including minor Savanna.
5. **Need** GAL report
6. CI Report filed 09/13/17 and addendum filed 11/16/17.
7. ~Proposed form Order: 04/03/17

**RECOMMENDATION:**

Need to clear notes 2-5.

(cs/lh/lc)

Superior Court of Calif, County of San Bernardino

Page: 6

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

-----  
DATE: 01/11/18 TIME: 8:29 DEPT: S37P  
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CASE#: GAR PS1700158

CASE NAME: LILLIAN NGUYEN

**SEE ALSO 5**

HEARING:  
Readiness Calendar

COUNSEL:  
LILLIAN NGUYEN (MIN)...PRO/PER  
MABLE KUENNIGER (PET)...PRO/PER

Readiness – No notes – JTD

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

-----  
DATE: 01/11/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1100838

CASE NAME: AIDAN JAMES BURCHIT SPECIAL NEEDS TRUST

HEARING:

Accounting Review

COUNSEL:

|                                |                        |
|--------------------------------|------------------------|
| AIDAN JAMES BURCHIT            | (MIN)...DONNASUE ORTIZ |
| AIDAN JAMES BURCHIT SPECIAL NE | (TRU)...               |
| DONNASUE SMITH ORTIZ           | (PET)...DONNASUE ORTIZ |
| MIDLAND STATES BANK            | (PET)...MELINDA S BELL |
| MIDLAND STATES BANK            | (STE)...MELINDA S BELL |
| MIDLAND STATES BANK            | (SUSAN A KATZEN        |
| SECURANT BANK & TRUST          | (PET)...SUSAN A KATZEN |

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 3<sup>rd</sup> SNT Account for Midland States Bank, approved on 06/01/17.
2. **Need** 4<sup>th</sup> Account beginning with 11/01/16.

#### RECOMMENDATION

Inquire status of accounting.

(lc)

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

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DATE: 01/11/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600129

CASE NAME: DAVID W LAFLIN

HEARING:

Probate status report filed.

COUNSEL:

DAVID W LAFLIN (DEC)...  
RICHARD LAFLIN (PET)...MONICA A MIHELL

GENERAL INFORMATION

**Continued from 11/02/17.**

THIS CASE SET FOR HEARING ON Status Report.

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

1. Letters of Administration issued to Richard Laflin, son, on 04/19/16; full authority, \$138,400 bond.
2. Administrator seeks an additional 3 months to close the estate in order to settle Bank of America and Verizon wireless claims.
3. Final Inventory and Appraisal filed 08/09/17. **Need** bank statements per local rule 20-908.
4. No proposed order. Submit after hearing.

RECOMMENDATION

Need to clear note 3. If approved, set Accounting/Status Review for **06/07/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)



Superior Court of Calif, County of San Bernardino

Page: 9

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

-----  
DATE: 01/11/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600199

CASE NAME: MTR OF BENNETTA BETBADAL

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL AUTHORIZATION  
TO ADMINISTER UNDER IAEA

COUNSEL:

ARLEN VERDEHYOU (PET)...JAMES B CHURCH  
BENNETTA BETBADAL (DEC)...

GENERAL INFORMATION

**Continued from 09/21/17 for proof of publication.**

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full  
authority under IAEA by Arlen Verdehyou, spouse

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

1. Petitioner requests bond not be required due to property will **not be** sold and no cash will ever come into the estate. Net estate value is \$56,521.99.
2. ~Proposed Form Order: 07/03/17

RECOMMENDATION

RFA, Court's discretion re bond. If approved, set Accounting/Status Review for **03/21/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs/lc)

Superior Court of Calif, County of San Bernardino

Page: 10

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

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DATE: 01/11/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700528

CASE NAME: WILLIAM PICKEL

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

CHAMPION MORTGAGE COMPANY

DENNIS GLENN PICKEL

WILLIAM PICKEL

(OBJ)...PROBER & RAPHAEL A LAW

(PET)...PRO/PER

(DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Receipt of Bond.

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

1. Dennis Pickel, son, appointed administrator on 12/11/17, full authority \$15,000 bond; however, order indicates decedent's name as administrator. Corrected order submitted on 12/14/17 and forwarded to dept same day. Court to inquire.
2. **Need** bond.

#### RECOMMENDATION

Inquire status of bond and corrected order.

(lc)

Future Hearing: 02/25/19 *Accounting Review*.

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

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DATE: 01/11/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700928

CASE NAME: JUDITH DIANE FINNICUM

HEARING:

Petition to determine succession to Real Property

COUNSEL:

|                       |                       |
|-----------------------|-----------------------|
| AMANDA ANDREW         | (PET)...SAMI MARTINEZ |
| ANDREW DAVIS          | (PET)...SAMI MARTINEZ |
| BREA MARSH            | (PET)...SAMI MARTINEZ |
| GORDON DAVIS          | (PET)...SAMI MARTINEZ |
| JUDITH DIANE FINNICUM | (DEC)...              |

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real and Personal Property by Gordon Davis, Amanda Andrew, Brea Marsh and Andrew Davis; brother, nieces and nephew.

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

1. Petitioners seek 100% interest in decedent's 100% interest in real and personal property per terms of will.
  - a. Gordon to receive 100% interest in real property.
  - b. Amanda, Brea and Andrew to share jewelry 1/3<sup>rd</sup> each.
2. Counsel intends to appear by CourtCall.
3. ~Proposed Form Order: 09/15/17.

RECOMMENDATION

RFA.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 12

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

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DATE: 01/11/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700929

CASE NAME: THE MARY JO SOHOVICH INTER VIVOS TRUST

HEARING:

Petition for ORDER COMPELLING TRUSTEE TO ACCOUNT REMOVING  
THE TRUSTEE AND APPTING SUCCESSOR TRUSTEE

COUNSEL:

|                                |                        |
|--------------------------------|------------------------|
| DONNA SOHOVICH                 | (PET)...GAUDY LAW, INC |
| MICHELE SOHOVICH               | (PET)...GAUDY LAW, INC |
| THE MARY JO SOHOVICH INTER VIV | (TRU)..                |

Currently under review by legal research.

Need 30 days' notice to respondent Denise Sohovich.

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

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DATE: 01/11/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1701199

CASE NAME: NOLA PAULINE TAYLOR AKA NOLA P. TAYLOR

HEARING:

Petition to determine succession to Real Property

COUNSEL:

BRUNO P. EDGE (PET)...PRO/PER  
EDGAR E. EDGE (PET)...PRO/PER  
MELVIN S. EDGE (PET)...PRO/PER  
NOLA PAULINE TAYLOR (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Edgar, Melvin and Bruno Edge, children.

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

1. Petitioners seek 100% interest, 1/3<sup>rd</sup> each, in decedent's 100% interest in real property per intestate succession.
2. ~Proposed Form Order: 11/16/17.

RECOMMENDATION

RFA.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 14

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

## TRUSTS AND MOTIONS

-----  
DATE: 01/11/18      TIME: 8:35      DEPT: S37P  
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CASE#: PRO PS1700087

CASE NAME: JOSEPH DALE ARCHAMBO

HEARING:

Motion Re: WAIVER OF APPRAISAL BY PROBATE REFEREE Filed by  
Petitioner TIMOTHY DALE ARCHAMBO

COUNSEL:

JOSEPH DALE ARCHAMBO      (DEC)...

TIMOTHY DALE ARCHAMBO      (PET)...PRO/PER

Currently under review by legal research.

**Need** notice of hearing and proof of service for probate referee Patrick Wright.

Future Hearing: 06/14/18 *Accounting Review*.

Superior Court of Calif, County of San Bernardino

Page: 15

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

-----  
DATE: 01/11/18 TIME: 8:35 DEPT: S37P  
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CASE#: PRO PS1700090

CASE NAME: PHYLLIS ALICE LAUGHTON

HEARING:

Motion Re: WAIVER OF APPRAISAL BY PROBATE REFEREE Filed by  
Petitioner PHILLIP RAYMOND LAUGHTON

COUNSEL:

PHILLIP RAYMOND LAUGHTON (PET)...PRO/PER  
PHYLLIS ALICE LAUGHTON (DEC)...

Currently under review by legal research.

**Need** notice of hearing and proof of service for probate referee B.M. Garvin.

Future hearing dates: 06/18/18 Accounting review

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

## CONSERVATORSHIPS

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DATE: 01/11/18      TIME: 9:30      DEPT: S37P  
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CASE#: CON DS1000043

CASE NAME: BRANDON WOODS

HEARING:

Accounting Review

COUNSEL:

|                    |                            |
|--------------------|----------------------------|
| BRANDON WOODS      | (CTE)...LENITA A SKORETZ   |
| BRANDON WOODS      | (CTE)...PRO/PER            |
| LAWRENCE A DEAN II | (CE )...SHERRI L KASTILAHN |
| LENITA A SKORETZ   | (PET)...LENITA A SKORETZ   |

**XREF: SGSS02270** (*Brandon Woods*)

### 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> Account for Lawrence Dean, PPF, approved on 03/09/17.
2. **Need** 7<sup>th</sup> Account beginning with 10/27/16.

### RECOMMENDATION

Inquire status of accounting.

(lc)



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

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DATE: 01/11/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1400077

CASE NAME: EDWARD FRANK SANTILLI

**SEE ALSO 18**

HEARING: Hearing re Final Discharge

COUNSEL:

|                          |                               |
|--------------------------|-------------------------------|
| ANITA SANTILLI           | (CPE)...HORSPPOOL & H ORSPOOL |
| CHRISTINA ERICKSON-TAUBE | (PET)...SHERRI L KASTILAHN    |
| EDWARD FRANK SANTILLI    | (CEE)...MITCHELL I ROTH       |
| EDWARD FRANK SANTILLI    | (DEC)...                      |
| J DAVID HORSPPOOL        | (HORSPPOOL & HORSPPOOL        |
| LILIANA SANTILLA         | (PET)...HORSPPOOL & HORSPPOOL |
| NATALIE ANN BLICKENSTAFF | (CPE)...                      |
| ROSEMARY HERNANDEZ-ENNIS | (SC )...HORSPPOOL & HORSPPOOL |

GENERAL INFORMATION

**Continued from 08/17/17 and 10/19/17.**

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Christina Erickson Taube approved on 08/11/16; order 11/28/16.
2. **Need** receipt for Anita Santilli, successor Conservator.
3. Ex Parte Petition for Final Discharge and Order returned for receipt. ~Proposed Form Order: 06/20/17.

RECOMMENDATION

Inquire status of receipt.

(lc)

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

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DATE: 01/11/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1400077

CASE NAME: EDWARD FRANK SANTILLI

**SEE ALSO 17**

HEARING:

Accounting Review

COUNSEL:

|                          |                              |
|--------------------------|------------------------------|
| ANITA SANTILLI           | (CPE)...HORSPOOL & H ORSPOOL |
| CHRISTINA ERICKSON-TAUBE | (PET)...SHERRI L KASTILAHN   |
| EDWARD FRANK SANTILLI    | (CEE)...MITCHELL I ROTH      |
| EDWARD FRANK SANTILLI    | (DEC)...                     |
| J DAVID HORSPOOL         | (HORSPOOL & HORSPOOL         |
| LILIANA SANTILLA         | (PET)...HORSPOOL & HORSPOOL  |
| NATALIE ANN BLICKENSTAFF | (CPE)...                     |
| ROSEMARY HERNANDEZ-ENNIS | (SC )...HORSPOOL & HORSPOOL  |

GENERAL INFORMATION

**Continued from 06/28/17 and 09/06/17.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Anita Santilli appointed successor conservator of the person and estate on 04/20/16, \$60,000 bond.
2. Inventory and Appraisal filed by previous Conservator Christina Erickson Taube on 09/23/14.
3. **Need** accounting.

RECOMMENDATION

Inquire status of accounting.

((lc/lh/lc/lh/lc/lh/ww/lc)

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

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DATE: 01/11/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1500328  
CASE NAME: NORMA PIMENTEL  
HEARING: Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of THE NORMA L PIMENTEL LIVING TRUST

COUNSEL:

|                                |                            |
|--------------------------------|----------------------------|
| NORMA PIMENTEL                 | (CEE)...DONNASUE ORTIZ     |
| SYLVIA PIMENTEL                | (PET)...GREGORY T ANNIGIAN |
| THE NORMA L PIMENTEL LIVING TR | (PET)...JONATHAN LACOUR    |
| VERONICA TREJO                 | (BANKS GARCIA & JANIS      |

**CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN**  
**XREF PRO PS1501107(Norma Pimentel Living Trust)**

GENERAL INFORMATION

Continued from 04/27/17. Counsel's report filed in court. Court is advised counsel have been served with the informal accounting in court this morning.

**Continued from 05/10/17, 07/12/17, 09/14/17 and 11/09/17. Trustee and Counsel Garcia to be present.**

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. On 09/20/16, Stip filed that **Veronica Trejo** will be **successor Trustee**; \$180,000 bond. **Sylvia Pimentel** was appointed **Conservator** of **person only** and **Veronica** was also appointed Conservator of **estate only** \$20,000 bond, posted 11/28/16.
2. Determination of Level of Care filed 07/12/17.
3. Notification of Conservatee's rights filed 07/12/17.
4. Care plan filed 11/09/17.
5. **Need** final Inventory & Appraisal per Pr.C.§2610.
6. **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
7. **If** the conservatorship estate holds interest in real property, need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313.

RECOMMENDATION

Need to clear notes 5-7.

(lc/lh/lc/lh/lc)

Future Hearing: 06/20/18 *Accounting Review*.

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

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DATE: 01/11/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700419

CASE NAME: MTR OF JACQUELINE MENDOZA  
HEARING: Petition for Appointment of Conservator

COUNSEL:

JACQUELINE MENDOZA (CTP)...  
SALLIE MENDOZA (CP)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Sallie Mendoza, mother.

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

1. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks medical powers. Capacity Declaration filed 01/02/18.
4. Proposed conservatee is developmentally disabled. **Need** appointment of counsel for report.
5. Proposed conservatee is developmentally disabled. **Need** IRC report.
6. **Need** Certificate of Completion of the Conservatorship Training Class.
7. Notice filed 01/02/18; however, proof of service is not dated at signature line. **Need** corrected proof of service.
8. **Need** Court Investigator report.
9. Certificate of Completion of the Conservatorship Training Class filed 12/21/17.
10. Citation returned served.
11. ~Proposed Form Order: 11/14/17.

RECOMMENDATION

Need to clear notes 4-8. If approved, set hearing for Compliance Review for **08/16/18** 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.  
(lc)

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

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DATE: 01/11/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700437  
CASE NAME: MTR OF SUSANA M. AGUILERA  
HEARING: Petition for Appointment of Conservator

COUNSEL:

JUAN AGUILERA (CP)...PRO/PER  
LUZ AGUILERA (CP)...PRO/PER  
SUSANA M AGUILERA (CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Juan and Luz Aguilera, parents.

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

1. Petitioners seek powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
2. Petitioners seek civil rights not be limited without court order. JTD
3. Petitioners seek medical powers. **Need** Capacity Declaration.
4. Proposed conservatee is developmentally disabled. **Need** appointment of counsel for report.
5. Proposed conservatee is developmentally disabled. **Need** IRC report.
6. **Need** return of citation.
7. **Need** Certificates of Completion of the Conservatorship Training Class.
8. **Need** notice of hearing and proof of service including 30 days' notice to IRC per Pr.C. § 1822(e).
9. Court Investigator report filed 12/14/17.
10. ~Proposed Form Order: 11/29/17.

RECOMMENDATION

Need to clear notes 3-8. If approved, set hearing for Compliance Review for **08/16/18** 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.

(lc)

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

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DATE: 01/11/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700438  
CASE NAME: MTR OF DAVID R HAMILTON JR  
HEARING: Petition for Appointment of Conservator

COUNSEL:

DAVID R HAMILTON SR (CP)...PRO/PER  
DAVID R HAMILTON JR (CTP)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by David Hamilton, father.

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

1. Petitioner seeks limited conservatorship; however, section 5 states proposed conservatee is not developmentally disabled. Court to inquire as it appears that section may be incorrect.
2. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
3. Petitioner seeks civil rights not be limited without court order. JTD
4. Petitioner seeks medical powers. Capacity Declaration filed 11/30/17.
5. List of required contacts does not state any grandparents. Court to inquire.
6. Proposed conservatee is developmentally disabled. **Need** appointment of counsel for report.
7. Proposed conservatee is developmentally disabled. **Need** IRC report.
8. **Need** return of citation.
9. **Need** notice of hearing and proof of service including 30 days' notice to IRC per Pr.C. § 1822(e).
10. **Need** due diligence declarations re siblings Joi, Brian and Timothy.
11. **Need** Court Investigator report.
12. Certificate of Completion of the Conservatorship Training Class filed 12/26/170
13. ~Proposed Form Order: 11/30/17.

RECOMMENDATION

Need to clear notes 6-11. If approved, set hearing for Compliance Review for **08/16/18** 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.  
(lc)

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

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DATE: 01/11/18 TIME: 9:30 DEPT: S37P  
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CASE#: SC SS02084

CASE NAME: MTR OF RONALD MISCOVIC

HEARING:  
Accounting Review

COUNSEL:  
INLAND COUNTIES REGIONAL CENTE (CE )...STEVEN K BECKETT  
INLAND COUNTIES REGIONAL CENTE (TEE)...STEVEN K BECKETT  
RONALD MISCOVIC (CTE)...  
SPECIAL NEEDS TRUST OF RONALD (TRU)...

***CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN, case reassigned to Judge TARA REILLY for all purposes.***

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 9<sup>th</sup> Master Trust Account for IRC approved on 01/26/17.
2. **Need** 10<sup>th</sup> Account beginning with 11/01/16.

#### RECOMMENDATION

Inquire status of accounting.

(lc)

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

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DATE: 01/11/18 TIME: 9:30 DEPT: S37P  
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CASE#: SC SS7258

CASE NAME: IN THE MATTER OF JIMMY LEE HOLLEY

HEARING:

EIGHTH Account and Report of CHRISTINA ERICKSON-TAUBE and  
Petition for allowance of fees filed.

COUNSEL:

|                          |                            |
|--------------------------|----------------------------|
| CHRISTINA ERICKSON-TAUBE | (CPE)...SHERRI L KASTILAHN |
| JIMMY LEE HOLLEY         | (CEP)...LENITA A SKORETZ   |
| MELODIE Z SCOTT          | (CPE)...MICHAEL J. G ILL   |
| MELODIE Z SCOTT          | (TP )...PRO/PER            |

GENERAL INFORMATION:

**Continued from 10/19/17. Bond reduced to \$55,000. Need summary of fees at reduced rates as discussed. Sherri Kastilahn' s fees approved.**

THIS CASE IS SET FOR HEARING ON 8<sup>th</sup> Account Current and Petition for Fees by Christina Erickson Taube, PPF.

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

1. Accounting covers 07/01/16 – 06/30/17.
2. Assets on hand: \$4,165.33 (cash of \$565.33 and preneed burial plan).
3. Current of \$98,000 bond. Petitioner seeks reduction to \$66,000. Appears ok.
4. Conservator requests fees of \$8,921.60 billed at \$65/115 per hour; hours not totaled. Itemized [Lf pgs. 20-30]. **Need** summary.
5. Attorney requests fees of \$4,585 for 13.1 hours at \$350 per hour. Itemized [LF, pgs. 31-33]. JTD.
6. ~Proposed Order: 09/18/17.

RECOMMENDATION:

Court's discretion re: fees. If approved, set hearing on the next accounting review for **10/04/18** (if one year) or **10/03/19**(if two years). Accounting to be filed 30 days' in advance.

(lc)