



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 01/16/18

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.

nb1228/0110

Superior Court of Calif, County of San Bernardino

Page: 1 ADD ON

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

DATE: 01/16/18 TIME: 8:30 DEPT: S35P

CASE#: CIF DS1700143

CASE NAME: YEH vs TORRES

HEARING:

Hearing Re: ELDER ABUSE RESTRAINING ORDER

COUNSEL:

KUO-JUL YEH (PP)...PRO/PER
OMAH TORRES (RP)...

Service completed.
(nb)

Superior Court of Calif, County of San Bernardino

Page: 1A

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PROBATE

DATE: 01/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO DS1000533

CASE NAME: JOHN C. SIEBERT

SEE ALSO 2, 3

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$500.00 ON COUNSEL

COUNSEL:

ARTHUR R. BOLTON (PET)...PAUL S. MARCHAND

JOHN C. SIEBERT (DEC)...

GENERAL INFORMATION:

Matter set at **08/25/15** hearing due to non-appearance and failure to prepare report as previously ordered, by Attorney Paul Marchand. Notice given by Judicial Assistant.

Continued from **10/13/15**. Court orders clerks' office to send counsel notice at the Cathedral City address. Court orders counsel to be present.

Continued from **12/15/15**. Attorney Paul Marchand has failed to appear and failed to file accounting as ordered. Citation issued as to: Paul Marchand.

Continued from **03/15/16 and 06/07/16**. Citation issued to: Paul Marchand who is cited and required to appear on 09/13/16.

Continued from 09/13/16. Court orders that the powers of Arthur Bolton are suspended until further order of the court. Court appoints the public administrator as special administrator. Public Administrator to prepare order/letters of special administrator. Citation issued to: Arthur Bolton.

Continued from 11/22/16. Court takes OSC re Sanctions/Contempt off calendar and reinstates powers of administration of Arthur R. Bolton and discharges the Public Administrator as Special Administrator. Court relieves Public Administrator. Counsel to prepare status/accounting by 02/21/17. If no report is filed, appearance is required.

Continued from 03/21/17 and 05/16/17 at request of Counsel. Substitution of attorney will be filed as new counsel will be substituting into the case. Notice to be given by Attorney Paul S. Marchand.

Continued from 07/18/17 due to non-appearances. Court sets OSC re Sanctions of \$500 as to Attorney Marchand and Administrator for failure to appear or file accounting. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON **OSC re Sanctions and Surcharge** for
FTA/Failure to File Report on Accounting/Status Review

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

1. Letters issued 6/6/11, full IAEA, no bond.
2. Need inventory & appraisal with supporting financial statements per Local Rule 20-908.
3. Accounting or status report now due. Need same.

RECOMMENDATION:

When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq.
(kra/vet/cbr//vet/cbr/vet/tax/cbr/nb/lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 01/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO DS1000533

CASE NAME: JOHN C. SIEBERT

SEE ALSO 1A, 3

HEARING:

Hearing Re: OSC RE SURCHARGE ON ADMINISTRATOR

COUNSEL:

ARTHUR R. BOLTON

(PET)...PAUL S. MARCHAND

JOHN C. SIEBERT

(DEC)...

See matter #1.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 01/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO DS1000533

CASE NAME: JOHN C. SIEBERT

SEE ALSO 1A, 2

HEARING:

Accounting Review

COUNSEL:

ARTHUR R. BOLTON

(PET)...PAUL S. MARCHAND

JOHN C. SIEBERT

(DEC)...

See matter #1.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 01/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500741

CASE NAME: ROBERTA HARRIET FERGUSON

HEARING:

Hearing re Final Discharge

COUNSEL:

JESSICA E FERGUSON

(PET)...DUANE P BOOTH

ROBERTA HARRIET FERGUSON

(DEC)...

VACATE – final discharge order entered 02/17/17.

(nb)

Superior Court of Calif, County of San Bernardino
Page: 4A ADD ON
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 01/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501151

CASE NAME: ROY AND PATRICIA HILL LIVING TRUST
SEE ALSO 4B, 4C, 4D

HEARING:

Hearing Re: OSC RE DISMISSAL OF PET FOR ORDERS, ETC

COUNSEL:

EARL BATES	(FULLERTON LEMANN SCHAEFER &
ROY HILL	(PET)...MICHAEL L ABERNATHY
TAWNYA BATES	(OBJ)...FULLERTON LEMANN SCHAEFER
THE ROY & PATRICIA HILL	(TRU)...PRO/PER
TRACY J HILL	(PET)...PRO/PER

GENERAL INFORMATION:

Continued from 10/03/17 at request of counsel.

Continued from 11/07/17, 12/13/17 and 12/14/17. Counsel represents all parties are still working together and making some progress towards settlement.

THIS CASE IS SET FOR HEARING ON **OSC re Dismissal** of Petition for Orders Cancelling Deed and Directing Conveyance of Real and Personal Property.

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

1. Matter set at 08/29/17 hearing upon information that parties have reached an agreement. **Need** same.
2. If there is no appearance at the OSC re: Dismissal, the petition for orders cancelling deed and directing conveyance of real and personal property etc. will be dismissed with prejudice.

RECOMMENDATION:

Need to clear note 1, then Court's discretion
(nb/lh/nb)

Superior Court of Calif, County of San Bernardino

Page: 4B ADD ON

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

DATE: 01/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501151

CASE NAME: ROY AND PATRICIA HILL LIVING TRUST

SEE ALSO 4A, 4C, 4D

HEARING:

Hearing Re: MOTION RE ENTRY OF JUDGMENT

COUNSEL:

EARL BATES	(FULLERTON LEMANN SCHAEFER &
ROY HILL	(PET)...MICHAEL L ABERNATHY
TAWNYA BATES	(OBJ)...FULLERTON LEMANN SCHAEFER
THE ROY & PATRICIA HILL	(TRU)...PRO/PER
TRACY J HILL	(PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by TRACY J HILL is GRANTED

Currently under review by Legal Research.

(LR)

Superior Court of Calif, County of San Bernardino
Page: 4C ADD ON
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 01/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501151

CASE NAME: ROY AND PATRICIA HILL LIVING TRUST
SEE ALSO 4A, 4B, 4D

HEARING:
Hearing Re: PETITION FOR ORDERS CANCELLING DEED, ETC

COUNSEL:
EARL BATES (FULLERTON LEMANN SCHAEFER &
ROY HILL (PET)...MICHAEL L ABERNATHY
TAWNYA BATES (OBJ)...FULLERTON LEMANN SCHAEFER
THE ROY & PATRICIA HILL (TRU)...PRO/PER
TRACY J HILL (PET)...PRO/PER

See notes on next matter #4A.

Superior Court of Calif, County of San Bernardino
Page: 4D ADD ON
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 01/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501151

CASE NAME: ROY AND PATRICIA HILL LIVING TRUST
SEE ALSO 4A, 4B, 4C

HEARING:

Hearing Re: MOTION RE ORDER APPOINTING RECEIVER TO, ETC

COUNSEL:

EARL BATES	(FULLERTON LEMANN SCHAEFER &
ROY HILL	(PET)...MICHAEL L ABERNATHY
TAWNYA BATES	(OBJ)...FULLERTON LEMANN SCHAEFER
THE ROY & PATRICIA HILL	(TRU)...PRO/PER
TRACY J HILL	(PET)...PRO/PER

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: STANFORD E. REICHERT

DATE: 01/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600855

CASE NAME: ROBERT E OWEN

HEARING:

Accounting Review

COUNSEL:

ROBERT E OWEN

(DEC)...

TIMOTHY PEREZ

(PET)...MARK H MCGUIRE

XREF: PROPS1400961 (Family Trust of Elmer E Reece Hele)

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 11/08/16, full authority, no bond.
2. No accounting or status report of administration.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700142

CASE NAME: JOHN RICHARD BREST, JR

HEARING:

FIRST AND FINAL Account and Report of LYNDA TAYLOR and Petition for allowance of fees filed.

COUNSEL:

DEPARTMENT OF HEALTH CARE SERV (TP)...PRO/PER
JOHN RICHARD BREST JR (DEC)...
LYNDA TAYLOR (PET)...BARBARA J DIBBLE

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by Administrator, Lynda Taylor ["Petitioner"].

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

1. Accounting period 12/24/16 to 08/31/17
2. Assets on Hand \$149,263.28 consisting cash.
3. Petitioner waives statutory compensation.
4. Attorney request statutory fees of \$6,517.25. Calculated.
5. **Need bank/financial statement to support date of death balance for Fidelity Investment Acct. No. XXX8063.**
6. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear note 5 then Court's discretion. If approved, set next hearing for receipts and final discharge for **01/22/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 01/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700783

CASE NAME: MTR OF FLORENCE EULAMAE BOADWAY

HEARING:

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

COUNSEL:

GAYLE KOERBER

(PET)...BRIAN J HOLOHAN

FLORENCE EULAMAE BOADWAY

(DEC)...

GENERAL INFORMATION:

Continued from 11/07/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by former daughter-in-law, Gayle Koerber ["Petitioner"].

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

1. Decedent was survived by a spouse who has been noticed and who has waived bond.
2. All heirs have waived bond. Estimated estate valued at \$200,500. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c). JTD.
3. Section 5 to petition [LF, p4] indicates there is no issue of a predeceased child, however, Section 8 [LF, p5] reflects there are two deceased sons and includes grandchildren. Need further clarification via verified supplement.
4. Proof of publication filed.
5. ~Proposed Form Order/Letters 08/04/17

RECOMMENDATION:

Need to clear note 3 then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **03/26/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(nb)

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.**

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 01/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1701231

CASE NAME: TERRENCE A LAMKIN

HEARING:

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

COUNSEL:

ANNE B MCVICKER (PET)...CRAIG M PARKER
TERRENCE A LAMKIN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by named executrix, sister Anne B. McVicker ["Petitioner"].

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

1. Will waives bond. However, Petitioner requests bond be fixed in the amount of \$20,000. Petitioner is a non-resident and Court has discretion to require bond per Pr. C. § 8571. JTD.
2. Proof of publication filed.
3. ~Proposed Form Order/Letters 12/08/17.

RECOMMENDATION:

RFA subject Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **03/26/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 01/16/18 TIME: 8:30 DEPT: S35P

CASE#: SPR SS04072

CASE NAME: VICTORIA QUENSENBERRY IRREVOCABLE SPECIAL NEEDS TRUST

HEARING:

Accounting Review

COUNSEL:

DEPT. OF DEVELOPMENTAL SERVICE (TP)...PRO/PER

RUTH L HENRICKS (PET)...HARTNELL LAW GROUP

VICTORIA QUESENBERRY IRREV SPC (TRU)...

GENERAL INFORMATION:

Continued from **03/26/15, 05/14/15, 07/30/15, 10/01/15** and **12/03/15**. The Court orders the accounting be filed by 2/29/16.

Continued from 3/29/16, 06/08/16, 08/18/16, 11/02/16, 02/15/17, 05/03/17, 08/01/17 and 09/19/17 at request of counsel to file accounting by 12/04/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 11th Account Current of Ruth Hendricks, Trustee, on 3/27/14 for the period ending 8/5/13.
2. Need 12th accounting beginning with 08/06/13.

RECOMMENDATION:

When the trustee fails to file an accounting as ordered, the court may take action as specified in Pr.C. § 800 and C.C.P. § 128.

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

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.**

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 01/16/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1601182

CASE NAME: JOHN M. VAN ZANDT REVOCABLE LIVING TRUST

SEE ALSO 12, 13

HEARING:

Hearing Re: FIRST AND FINAL

COUNSEL:

BILL GAUDREAU	()...
CAROL KILLEN	()...
HEIDI HUTLEY	(PET)...	JOSEPH A WALKER
JAY GAUDREAU	()...
JOHN A VANZANDT REVOCABLE LIVI	(TRU)...	
KATHRYN GAUDREAU	()...
ROBERT GAUDREAU	()...
STEPHANIE GAUDREAU	()...
STEVEN GARUDRAU	()...
SUN WEST MORTGAGE COMPANY INC	(WOLFE & WYMAN LLP	
WILLINE GAUDREAU	(PET)...	BROWN WHITE & OSBORN
WILLINE GAUDREAU	(RES)...	

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account by Successor Trustee, Willine Gaudreau aka Willine G. Van Zant ["Petitioner"- spouse].

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

1. Accounting period 10/10/16 to 08/15/17.
2. Assets on Hand \$871,492.20 consisting of \$1,153.46 in cash and remaining in real property.
3. Petition indicates only real property was held in trust and that the attached schedules are provided as a courtesy in summary form and there is no itemization of expenditures.
4. Need legal description for real property per Local Rule 20-610 via verified supplement.
5. Need Notice of Hearing with proof of service.

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.**

6. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 4-5 then Court's discretion. If approved, set next hearing for receipts and final discharge for **01/22/19**.

(nb)

Future Hearing:

03/12/18 Petition for instruction and for authority to sell real property

05/22/18 Readiness calendar

05/22/18 Petition for lack of capacity undue influence etc.

06/18/18 Court Trial

06/18/18 Petition for lack of capacity undue influence etc

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 01/16/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1601182

CASE NAME: JOHN M. VAN ZANDT REVOCABLE LIVING TRUST

SEE ALSO 11, 13

HEARING:

Hearing Re: VERIFIED FIRST AMENDED PETITION

COUNSEL:

BILL GAUDREAU	()...
CAROL KILLEN	()...
HEIDI HUTLEY	(PET)...	JOSEPH A WALKER
JAY GAUDREAU	()...
JOHN A VANZANDT REVOCABLE LIVI	(TRU)...	
KATHRYN GAUDREAU	()...
ROBERT GAUDREAU	()...
STEPHANIE GAUDREAU	()...
STEVEN GARUDRAU	()...
SUN WEST MORTGAGE COMPANY INC	(WOLFE & WYMAN LLP	
WILLINE GAUDREAU	(PET)...	BROWN WHITE & OSBORN
WILLINE GAUDREAU	(RES)...	

Currently under review by Legal Research.
(LR)

Continued matter – notice not re-reviewed.
(nb)

Future Hearing:

03/12/18 Petition for instruction and for authority to sell real property

05/22/18 Readiness calendar

05/22/18 Petition for lack of capacity undue influence etc.

06/18/18 Court Trial

06/18/18 Petition for lack of capacity undue influence 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.**

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 01/16/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1601182

CASE NAME: JOHN M. VAN ZANDT REVOCABLE LIVING TRUST

SEE ALSO 11, 12

HEARING:

Petition for PRELIMINARY INJUNCTION ENJOINING TRUSTEE SALE

COUNSEL:

BILL GAUDREAU	()...
CAROL KILLEN	()...
HEIDI HUTLEY	(PET)...	JOSEPH A WALKER
JAY GAUDREAU	()...
JOHN A VANZANDT REVOCABLE LIVI	(TRU)...	
KATHRYN GAUDREAU	()...
ROBERT GAUDREAU	()...
STEPHANIE GAUDREAU	()...
STEVEN GARUDRAU	()...
SUN WEST MORTGAGE COMPANY INC	(WOLFE & WYMAN LLP	
WILLINE GAUDREAU	(PET)...	BROWN WHITE & OSBORN
WILLINE GAUDREAU	(RES)...	

Currently under review by Legal Research.
(LR)

Continued matter – notice not re-reviewed.
(nb)

Future Hearing:

03/12/18 Petition for instruction and for authority to sell real property

05/22/18 Readiness calendar

05/22/18 Petition for lack of capacity undue influence etc.

06/18/18 Court Trial

06/18/18 Petition for lack of capacity undue influence 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.**

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIPS**

DATE: 01/16/18 TIME: 9:30 DEPT: S35P

CASE#: CON DS1100022

CASE NAME: MARK MAGDALENO

SEE ALSO 15

HEARING:

Hearing Re: OSC RE SANCTIONS \$1,500 FOR FAILURE TO APPEAR

COUNSEL:

LINDA CABRAL

(CP)...PRO/PER

MARK MAGDALENO

(CTP)...E JOAN NELMS

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC Re Sanctions \$1,500 for Failure To Appear

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

1. Matter set at 11/07/17, wherein, Court ordered Linda Cabral to be personally present at hearing due to failure to appear.
2. Notice by Judicial Assistant.
3. **Report by court-appointed counsel, E. Joan Nelms filed 12/21/17.**
4. **Need to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).**

RECOMMENDATION:

Need to clear note 4 then Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino
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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 01/16/18 TIME: 9:30 DEPT: S35P

CASE#: CON DS1100022

CASE NAME: MARK MAGDALENO

SEE ALSO 14

HEARING:

Hearing Re: OSC RE SANCTIONS \$1,500.00 FOR FAILURE TO FILE

COUNSEL:

LINDA CABRAL (CP)...PRO/PER
MARK MAGDALENO (CTP)...E JOAN NELMS

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC Re Sanctions \$1,500 for Failure To File

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

1. Matter set at 11/07/17, wherein, Court ordered Linda Cabral to be personally present at hearing due to failure to file Petition to Terminate Conservatorship, as she indicated to the Court..
2. Notice by Judicial Assistant.
3. **Report by court-appointed counsel, E. Joan Nelms filed 12/21/17.**
4. **Need to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).**

RECOMMENDATION:

Need to clear note 4 then Court's discretion
(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/16/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1200103

CASE NAME: DAVID JAMES OWENS JR

HEARING:

Third Account and Report of INLAND COUNTIES REGIONAL CENTER, INC
and Petition for allowance of fees filed.

COUNSEL:

DAVID JAMES OWENS JR (CEP)...EDWARD B FISCHER &
INLAND COUNTIES REGIONAL CENTE (CE)...LAYNE A BARTHOLOMEW

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Third Account Current and Report of IRC and
Petition for Approval of Trustee's Fees and Attorney's Fees by Trust Administrator,
IRC ["Petitioner"].

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

1. Accounting covers 10/01/15 to 09/30/17.
2. Assets on hand: \$16,563.53 in cash held in a pooled investment fund.
3. Petitioner requests approval of trustee fees already taken by Master Trust of California in the amount of \$2,000. Billed at \$1,250 for the first \$50,000; 2% of the next \$250,000; 1.65% of the next \$450,000 and 1.50% of the next \$250,000.
4. Petitioner requests authority to allow Master Trust to continue taking its annual fee in quarterly payments according to its fee schedule dated 06/13/17 [LF, p. 54-55]. JTD
5. Attorney requests fees of \$905. Billed at \$250/hour for 1.5 hours' attorney time and \$100/hour for 5.3 hours' paralegal time. Itemized [LF, pgs. 45-46].
6. Current bond of \$48,000. Suggest bond reduction to \$20,000 (includes recovery). JTD.
7. Total Charges and Total Charges to Summary of Account [LF, p. 12] do not match. Need corrected summary
8. Petitioner has paid Intelligent Minds for Companion Services during this accounting period. Need verified declaration(s) to verify dates of service, performance of services and that payment has been received per Local Rule 20-1406(c).

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.**

9. Petitioner requests authority to amend the trust to add Medicaid Language provisions as a new Article Nine of the trust. JTD.
10. ~Proposed Order 11/29/17

RECOMMENDATION

Need to clear notes 7-8 then Court's discretion re bond and trust amendment. If approved, set hearing on the next Accounting Review for or **11/29/18** (if one year) or biennial for **11/28/19** (if two years). Account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 01/16/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600191

CASE NAME: RAFAEL ARREDONDO LOPEZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of AZUCENA ARREDONDO

COUNSEL:

AZUCENA ARREDONDO (CPE)...PRO/PER
RAFAEL ARREDONDO LOPEZ (CEE)...MITCHELL I ROTH

GENERAL INFORMATION

Order appointing Azucena Arredondo Conservator of the Person entered 06/13/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

- 1 Need proof of service of a copy of the Order for Conservatorship with
Notification of Conservatee's Rights per Pr.C.§1830(c).
- 2 Statement of Care Plan is not dated. Need same.
- 3 Need a Determination of Conservatee's Appropriate Level of Care per
Pr.C.§2352.5 (form GC-355).

RECOMMENDATION:

Need to clear notes 2-3.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 01/16/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600253

CASE NAME: MTR OF CHRISTOPHER EMON JONES

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of CHRISTOPHER T JONES

COUNSEL:

CHRISTOPHER EMON JONES (CTP)...SHERRI L KASTILAHN

CHRISTOPHER T JONES (CP)...PRO/PER

QIANA JONES (CP)...PRO/PER

GENERAL INFORMATION

Continued from 08/15/17. No appearances. Court orders that both the co-conservators and Sherry Kastilahn are to be present in court on November 7, 2017. Notice by Judicial Assistant.

Continued from 11/07/17. Court orders Sheri Kastilahn and both conservators to be personally present in court. Notice by Judicial Assistant

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Christopher T Jones and Qiana Jones appointed limited co-conservators of the person on 01/10/17.
2. Care Plan in accord with Pr. C. §2352.5.
3. Notification of Conservatee's Rights filed 01/18/17.
4. Determination of Conservatee's Appropriate Level of Care form filed 04/04/17 is incomplete at item #4a. Need completed form.

RECOMMENDATION

Need to clear note #4.

(lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 01/16/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700420

CASE NAME: MTR OF STEPHANIE ALICIA ORTEGA

HEARING:

PROBATE/CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:

ARLENE M SWEET	(CP)...PRO/PER
EVELYN M JENSEN	(CP)...PRO/PER
ROSANNE DANFORD	(CP)...TAYLOR SUMMERS RHODES
STEPHANIE ALICIA ORTEGA	(CTP)...JOHN L. GORDON

GENERAL INFORMATION:

Order appointing Rosanne Danford (mother), Arlene M. Sween and Evely M. Jensen Limited Co-Conservators entered 06/24/10.

THIS CASE IS SET FOR HEARING ON CMC re Transfer in from LA County.

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

1. Last Capacity Declaration filed 04/30/10 in LA County. Does Court wish to require an updated capacity declaration? JTD.
2. Last CI Report filed 06/28/17 in LA County. Need CI Report.
3. Conservatee is developmentally disabled. Need appointment of counsel and report by same.
4. Need IRC report.
5. Need a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).
6. Need to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).

RECOMMENDATION:

Need to clear notes 2-6 then Court's discretion
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PA & PG

DATE: 01/16/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1200209

CASE NAME: WILDA MAY

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

WILDA MAY

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Continued from **03/14/16**. Accounting should be a biennial account.

Continued from 03/13/17 and 12/04/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 2nd Account by PG approved on 08/03/15.
2. **Need 3rd Account now due for the period 02/01/15- 01/31/17.**
3. **Conservatee passed away on 05/09/16. Need pre and post death accounting.**

RECOMMENDATION

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2. **Set next hearing on Monday calendar.**

(dl/nb/ww/nb)

Superior Court of Calif, County of San Bernardino
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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 01/16/18 TIME: 10:00 DEPT: S35P

CASE#: PRO DS1100010

CASE NAME: IGOR GRIGORIEV

HEARING:
Probate status report filed.

COUNSEL:
DENNIS M ASSURAS (PET)...DENNIS M ASSURAS
IGOR GRIGORIEV (DEC)...
KIMIA GRIGORIEV (PET)...DENNIS M. ASSURAS
SAN BERNARDINO COUNTY PUBLIC A (PET)...CRAIG M PARKER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report (09/29/17) by Successor Administrator, Public Administrator ["Petitioner"].

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

1. Petitioner alleges the estate is not in a condition to be closed as Petitioner is still investigating potential additional stock and is attempting to marshal it from unclaimed property held by the Secretary of California.
2. Need final inventory and appraisal once all assets of the estate have been located.
3. ~Proposed Order 09/29/17.

RECOMMENDATION:

Court's discretion. If approved, court to set hearing re Accounting Review for **01/22/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 01/16/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS0801079

CASE NAME: JERRY R. EDWARDS JR

HEARING:

Accounting Review

COUNSEL:

BERNARD M BIDART	(TP)...
JERRY R EDWARDS III	(PET)...FERD & ASSOCIATES
JERRY R EDWARDS JR	(DEC)...
PUBLIC ADMINISTRATOR	(SA)...CRAIG M PARKER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Status Report Order entered 01/17/17.
2. No accounting or updated status report. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 01/16/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1100251

CASE NAME: MTR OF CHARLES RAYMOND GROOM

HEARING:

Accounting Review

COUNSEL:

CHARLES RAYMOND GROOM	(DEC)...
DEPARTMENT OF HEALTH CARE SERV	(TP)...PRO/PER
KEVIN C GROOM	(PET)...JOHN H LEJNIEKS
PUBLIC ADMINISTRATOR	(SA)...CRAIG M PARKER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Status Report Order entered 01/10/17.
2. Need final inventory and appraisal.
3. No accounting or updated status report. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/16/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1500373

CASE NAME: REBIA CALLAHAN

HEARING:

Accounting Review

COUNSEL:

DEPARTMENT OF HEALTH CARE SERV (PRO/PER	
PUBLIC ADMINISTRATOR (PET)...CRAIG M PARKER	
REBIA CALLAHAN (DEC)...	
ROBERT WASHINGTON III (TP)...HARTNELL LAW GROUP	

GENERAL INFORMATION:

Continued from **07/11/16, 07/12/16 and 09/20/16** at request of counsel. Notice to be given by Craig Parker.

Continued from 09/19/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Need final inventory and appraisal.
2. No accounting/status report. Need same.

RECOMMENDATION:

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

(dl/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/16/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1500646

CASE NAME: CHERRAKEE LEE GROETZINGER

HEARING:

Accounting Review

COUNSEL:

CHERRAKEE LEE GROETZINGER	(DEC)...
DEPARTMENT OF HEALTH CARE SERV	(TP)...PRO/PER
LON M ANDERSON	(PET)...PRO/PER
SUSAN C BUCKELEW	(PET)...PRO/PER

GENERAL INFORMATION:

Set on **10/31/16** due to non-appearance. Notice by Judicial Assistant.

Continued from **01/09/17**. No appearance. Court notifies the Public Administrator of possible appointment.

Continued from 01/10/17 at request of counsel. Public administrator to conduct investigation.

Continued from **03/07/17**. Citation issued to Lon Anderson, who is cited to appear on 05/16/17 and show cause why FTA/failure to file required documents.

Matter set on **06/16/17**. An accounting is ordered to be filed by 07/01/17.

Continued **08/01/17**. Lon Anderson to file date of death bank statements with the Court. Court orders Susan Buckelew to be present personally or by court call at next hearing.

Continued from **09/26/17** to allow Lon Anderson to file an accounting and for Susan C. Buckelew to appear as previously ordered. Notice given by Mr. Parker.

Continued from 11/21/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued 08/24/15, full authority, no bond.
2. Final inventory and appraisal filed.
3. Declaration filed 05/16/17 by Lon Anderson.
4. No accounting or status report of administration. Need same.

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.**

RECOMMENDATION:

Inquire status.
(nb/lh/nb/lh/nb)

Future Hearing:
09/04/18 Accounting Review (by Successor)

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.**

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 01/16/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1601079

CASE NAME: MTR OF CARRIE JOHNSON

HEARING:

Accounting Review

COUNSEL:

CARRIE JOHNSON

(DEC)...

PUBLIC ADMINISTRATOR

(PET)...CRAIG PARKER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Authorizing PA to Collect and Sell the Property of the Decedent entered 11/18/16.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

MISC

DATE: 01/16/18 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1601271

CASE NAME: SHERMAN LEE MITCHELL

VACATED

HEARING:

Hearing Re: COURT TRIAL ON PETITION FOR AMENDED PROBATE, ETC

COUNSEL:

RHYAN MITCHELL	(PRO/PER
RIANNE MITCHELL	(OBJ)...
SHERMAN LEE MITCHELL	(DEC)...
SHERMAN LEE MITCHELL II	(PET)...PRO/PER

No notes – Court Trial.

(nb)

Future Hearing:

01/17/18 Court Trial

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: 01/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO DS1000326

CASE NAME: NAFIZA NOOR SPECIAL NEEDS TRUST

HEARING:

Accounting Review

COUNSEL:

ABUL KALAM AZAD

(PET)...HORSPOOL & HORSPOOL

ABUL KALAM AZAD

(TEE)...J. DAVID HORSPOOL

NAFIZA NOOR SPECIAL NEEDS TRUS

(TRU)...

VACATE – Fifth account filed and set for 03/21/18.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 01/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400624

CASE NAME: Lucretia May Medley

HEARING:

Accounting Review

COUNSEL:

ELMER FRED GREEN JR	(OBJ)...KYLE A PATRICK
ELMER FRED GREEN JR.	(PET). KYLE A PATRICK,
LOUIS SCOTT YOUNG	(PET)...KEITH S WALKER
LUCRETIA MAY MEDLEY	(DEC).

VACATE – Status Report filed and set for 03/01/18.
(lh/nb)

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.**

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 01/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500336

CASE NAME: William Henry Harrison Dunston

HEARING:

Probate status report filed.

COUNSEL:

DIANNA TURNER

(PET)...ELISABETH KEMPE-

WILLIAM HENR Y HARRISON DUNSTO

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report (10/03/17) by Administrator, William Henry Harrison Dunston ["Petitioner"].

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

1. Petitioner alleges the estate is not in a condition to be closed as Petitioner recently discovered assets which escheated to the State Controller's Office and there is also a an Individual Retirement Account belonging to the Decedent which remains to be marshalled.
2. Proposed Order 10/03//17 does not include hearing date, dept. or judge.

RECOMMENDATION:

Court's discretion. If approved, court to set hearing re Accounting Review for **01/22/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 01/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500726

CASE NAME: Special Needs Trust of Mark L. Kingsley

HEARING:

THIRD Account and Report of INLAND COUNTIES REGIONAL CENTER INC.
and Petition for allowance of fees filed.

COUNSEL:

INLAND COUNTIES REGIONAL CENTE (PET)...LAYNE A BARTHOLOMEW
SPECIAL NEEDS TRUST OF MARK L. (TRU)...

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

GENERAL INFORMATION

SNT established in Kern County on 8/24/11 and currently administered by Master Trust of California. (Mother, Mary Ann Morton, was appointed Limited Conservator of the Estate. The order made by Kern County 6/23/15 only transferred the Trust, not the Conservatorship.) Copy of Trust filed 11/10/15.

THIS CASE IS SET FOR HEARING ON Third Account Current and Report of Trustee; Decrease of Bond; and Petition for Fees by Trustee, IRC ["Petitioner"].

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

1. Accounting period 08/01/15 to 06/30/17.
2. Assets on hand \$28,845.33 consisting of \$28,463.75 cash held in a pooled investment account.
3. Current bond set at \$45,200. Petitioner requests a bond reduction by \$13,200 for a new bond of \$32,000 (includes recovery). Appears sufficient. JTD
4. Petitioner requests ratification of fees paid in the amount of \$2,000 pursuant to the Master Trust fee schedule dated 02/14/12.
5. Petitioner requests authority to allow Master Trust to continue taking an annual fee in quarterly payments pursuant to its revised fee schedule of 06/13/17 [LF, p. 52].
6. Attorney requests fees of \$1,030.00 less \$695 already paid leaving a balance owing of \$335.00. Billed at \$250/hour for 2.8 hours' attorney time and \$100/hour for 3.3 hours' paralegal time. Itemized [LF, pgs. 43-44]. JTD.
7. Petitioner requests authority to amend the trust to add Medicaid Language provisions as a new Article Nine of the trust. JTD.

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.**

8. ~Proposed order 10/17/17

RECOMMENDATION:

Court's discretion. If approved, set hearing re next Accounting Review for **08/29/18** (if one year) or **08/28/19** (if two years). Account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 01/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600466

CASE NAME: BEATRICE DORETTA CHISUM

HEARING:

Accounting Review

COUNSEL:

BEATRICE LORETTA CHISUM (DEC)...

JEANNETTA LORETTA LOVE (PET)...MATTHEW SHEASBY

GENERAL INFORMATION

Continued from 11/22/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review of Jeannetta Loretta Love

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

1. Letters Testamentary issued to Jeannetta Loretta Love on 09/14/16 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/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 01/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600677

CASE NAME: MTR OF VIOLA A OLAZABA

HEARING:

Accounting Review

COUNSEL:

BARBARA P LANGLOIS	(PET)...PRO/PER
FRANCES C PEREZ	(OBJ)...CHANDLER LAW FIRM
LESLIE GUSTAFSON	(PET)...PRO/PER
PAULA GUSTAFSON	(PET)...PRO/PER
VIOLA A OLAZABA	(DEC)...

XREF: PROPS1501026 (Armando Olazaba)

PROPS1600064 (Armando Olazaba)

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 11/08/16, 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.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600726

CASE NAME: GIOVANNI PURECO SPECIAL NEEDS TRUST

HEARING:

THIRD Account and Report of INLAND COUNTIES REGIONAL CENTER and
Petition for allowance of fees filed.

COUNSEL:

GIOVANNI PURECO	(MIN)...
GIOVANNI PURECO SPECIAL NEEDS	(TRU)...
INLAND COUNTIES REGIONAL CENTE	(PET)...LAYNE A BARTHOLOMEW
INLAND COUNTIES REGIONAL CENTE	(TEE)...LAYNE A BARTHOLOMEW
VIANEY TLAPALAMATL	(PET)...JACK H ANTHONY

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Third Account Current and Report of SNT and
Petition for Approval of Trustee's Fees and Attorney's Fees by Trustee, IRC
["Petitioner"].

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

1. Accounting covers 06/01/16 to 06/30/17.
2. Assets on hand: \$191,628.94 in cash held in a pooled investment fund.
3. Current bond of \$207,083.51. Petitioner requests a bond increase by \$3,916.49 for a new bond of \$211,000. Appears sufficient. JTD.
4. Petitioner requests approval and ratification of trustee fees already taken by Master Trust of California in the amount of \$3,776.43. Billed at \$1,250 for the first \$50,000; 2% of the next \$250,000; 1.65% of the next \$450,000 and 1.50% of the next \$250,000.
5. Petitioner requests authority to allow Master Trust to continue taking its annual fee in quarterly payments according to its fee schedule dated 06/13/17 [LF, p. 51]. JTD
6. Attorney Bartholomew requests fees of \$960. Billed at the reduced rate of \$250/hour for 2.6 hours' attorney time and \$100/hour for 3.1 hours' paralegal time. Itemized [LF, pgs. 40-41].
7. Attorney Anthony requests fees of \$1,400.00. Billed at \$350/hour for 4 hours' attorney time. Itemized [LF, p. 46].

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.**

8. Petitioner requests authority to amend the trust to add Medicaid Language provisions as a new Article Nine to the SNT. JTD.
9. ~Proposed Order 10/17/17

RECOMMENDATION

Court's discretion re bond and trust amendment. If approved, set hearing on the next Accounting Review for or **08/29/18** (if one year) or biennial for **08/28/19** (if two years). Account to be filed 30 days' in advance of hearing. Note requirements of Local Rules. (nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 01/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700534

CASE NAME: JOHNNY HERMOSILLA

HEARING:

Hearing Re: Status

COUNSEL:

DECI HERMOSILLA

(PET)...JAMES E NEWNHAM

IAN HERMOSILLA

(PET)...JAMES E NEWNHAM

JOHNNY HERMOSILLA

(DEC)..

REMEDIOS C ABARO

(TP)...LENITA A SKORETZ

No note – Status.

(nb)

Future Hearing:

01/15/19 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

DATE: 01/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701025

CASE NAME: MTR OF MARGARET ADRIENNE THOMPSON

HEARING:

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

COUNSEL:

MARGARET ADRIENNE THOMPSON (DEC)...
TERI LYN PEREZ (PET)...ROBERT J SPITZ

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by daughter, Teri Lyn Perez ["Petitioner"].

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

1. Petition indicates all heirs waive bond. Need Mandatory Waivers of Bond by Heir or Beneficiary, form DE-142/DE-111 by Teri Lyn Perez. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c).
2. Nomination of this petitioner by sibling, Lewis D. Thompson [LF, p. 11].
3. Section 8 to petition [LF, p.5] does not indicate relationships of those listed. However, Attachment 3f(2)(a) [LF, p.9] indicates parties are decedents issue.
4. Need proof of publication.
5. ~Proposed Order/Letters 10/19/17.

RECOMMENDATION:

Need to clear note 4 then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **03/26/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701034

CASE NAME: KIM L WIMBERLY

HEARING:

Petition to determine succession to Real Property

COUNSEL:

JEFFREY COCKER	(PET)...PAUL
KIM LOUISE WIMBERLY	(DEC)...
RACHELLE M BELL	(PET)...PAUL
ROCKY A TEPESANO	(PET)...PAUL

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real and Personal Property (Estates \$150,000 or less) by Rocky A. Tepesano, Jeffrey N. Coker and Rachelle M. Bell ["Petitioners"].

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

1. Inventory & Appraisal attached to petition [LF, p8], Sections 3-5 are incomplete. Need complete inventory.
2. Petitioners request a determination that decedent's real property located in Hesperia, San Bernardino County and a Bank of America Cashier's Check #004987401 dated 09/10/14, pass to petitioners without administration.
3. Petitioners are decedent's issues and heirs per intestate succession.
4. ~Proposed Order 10/13/17.

RECOMMENDATION:

Need completed I&A then Court's Discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 01/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701235

CASE NAME: Peggy Sue Smith

HEARING:

Petition for Probate of Will and for Letters of Testamentary w/full IAEA

COUNSEL:

JOSHUA ELLIS SMITH (PET)...SU P CHEAH

PEGGY SUE SMITH (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by named executor, grandson Joshua E. Smith ["Petitioner"].

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

1. Will is not self-proving (not signed under penalty of perjury under the laws of the State of California). Need Proof of Subscribing Witness.
2. **Proof of publication filed.**
3. Will waives bond. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c).
4. ~Proposed Form Order/Letters 12/11/17.

RECOMMENDATION:

Need to clear note 1 then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **03/26/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

DATE: 01/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1100050

CASE NAME: THOMAS C. ETIE

HEARING:

Accounting Review

COUNSEL:

THOMAS C ETIE	(CPE)...HORSPPOOL & HORSPPOOL
WILLIAM CROSTHWAITE	(PET)...WILLIAM R SIMON JR
WILLIAM F CROSTHWAITE	(CPE)...JASON S SHEINBERG
WILLIAM F. CROSTHWAITE	(CPE)...J WILEY JONES

GENERAL INFORMATION

Continued from 11/20/17. No appearances. Notice by Judicial Assistant.

THIS CASE SET FOR HEARING ON Accounting Review.

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

1. Combined 4th account of conservator and 2nd **trust** accounting for William Crosthwaite, trustee/conservator approved on 10/17/16.
 - a. **Need** Order on 4th accounting submitted for signature.
 - b. **Need** additional bond of \$27,420.36 for total bond of \$497,420.36 per 10/17/16 minute order.
2. **5th Account filed.**

RECOMMENDATION

Inquire status of Order on 4th account and additional bond.

(ww/nb)

FUTURE HEARING DATES:

02/05/18 Fifth Account Current

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.**

Superior Court of Calif, County of San Bernardino

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

DATE: 01/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700075

CASE NAME: MTR OSMAN IVAN SANCHEZ LICONA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of NORMA A SANCHEZ

COUNSEL:

NORMA A SANCHEZ (CP)...PRO/PER
OSMAN IVAN SANCHEZ LICONA (CTP)...CRAIG M PARKER

GENERAL INFORMATION

Order appointing mother, Norma A. Sanchez, Limited Conservator of the Person
entered 06/13/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Notification of Conservatee's Rights; Care Plan; including a Determination of
Conservatee's Appropriate Level of Care filed.

RECOMMENDATION:

None.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 01/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700076

CASE NAME: BRENNEN TYLER FOSTER

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ALISON LINDA FOSTER

COUNSEL:

ALISON LINDA FOSTER	(CP)...PRO/PER
BRENNEN TYLER FOSTER	(CTP)...MITCHELL I ROTH
RUSSELL L FOSTER	(CP)...PRO/PER

GENERAL INFORMATION

Order appointing parents, Alison L. Foster and Russell L. Foster Limited Co-Conservators of the Person on 06/13/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Notification of Conservatee's Rights; Care Plan; including a Determination of Conservatee's Appropriate Level of Care filed.

RECOMMENDATION:

None.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700136

CASE NAME: SELENA ANDERSON

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of PAMELA ANDERSON

COUNSEL:

PAMELA ANDERSON (CP)...PRO/PER
SELENA ANDERSON (CTP)...JENNIFER M DANIEL

GENERAL INFORMATION

Order Appointing Pamela Anderson Temporary Conservator of the Person entered
04/26/17. General order entered 07/11/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

- 1 Need proof of service of a copy of the Order for Conservatorship with
Notification of Conservatee's Rights per Pr.C.§1830(c).
- 2 Need Statement of Care Plan in accord with Pr.C.§2352.5.
- 3 Need a Determination of Conservatee's Appropriate Level of Care per
Pr.C.§2352.5 (form GC-355).

RECOMMENDATION:

Inquire status.
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 01/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700315

CASE NAME: MTR OF CINDY MARTINEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

BRAULIO MARTINEZ (CP)...PRO/PER

CINDY MARTINEZ (CTP)...J. DAVID HORSPOOL

GENERAL INFORMATION

Continued from **10/03/17**. Attorney Horspool appointed.

Continued from 11/14/17. Attorney Walter Moore is present (as a friend of the court – amicus curiae) to answer some questions regarding a LPS conservatorship. This is not a limited conservatorship as the proposed conservatee is not developmentally disabled. Court to contact the court employees at mental health regarding this case. Notice to be given by Attorney Horspool.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Braulio Martinez, father

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, control right to contract, and give or withhold medical consent. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks medical powers. Need Capacity Declaration.
4. Petition is incomplete at item #9 as to medical treatment. Need verified supplement.
5. Petition alleges proposed conservatee is developmentally disabled. However, it appears an LPS conservatorship may be appropriate. Does Court wish to appoint Counsel?
- 6. Report by court-appointed counsel, J. David Horspool, filed 11/08/17.**
7. Need List of required contacts (Local form SB-12224).
8. Need Certificate of Completion of the Conservatorship Training Class.

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.**

9. Citation served by mail. **Need proof of personal service.**
10. Court Investigator report filed.
11. No proposed order submitted.

RECOMMENDATION

Need to clear notes 3-4, 7-9. If approved, set hearing for Compliance Review for **08/31/18** 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/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700440

CASE NAME: JOSHUA LESSARD

HEARING:

Petition for Appointment of Conservator

COUNSEL:

JANICE LESSARD	(CP)...LAYNE A BARTHOLOMEW
JOSHUA LESSARD	(CTP)...
KEVIN LESSARD	(CP)...LAYNE A BARTHOLOMEW

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by parents Kevin Lessard and Janice Lessard ["Petitioners"].

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. Need appointment of counsel and report by same.
3. **Medical Capacity Declaration filed.**
4. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
5. Proposed limited conservatee's civil and legal rights are not to be limited without a court order.
6. Need return of Citation.
7. Need Court Investigator Report.
8. Need Inland Regional Center Report.
9. Need Certificates of Completion re Conservatorship Class.
10. ~Proposed Form Order/Letters 12/04/17.

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.

RECOMMENDATION:

Court to appoint counsel then need to clear notes. If approved, set hearing for Compliance Review for **08/31/17** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

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

DATE: 01/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700446

CASE NAME: Crisca C Clemons

HEARING:
Petition for Appointment of Conservator

COUNSEL:
CRISCA C CLEMONS (CTP)...
ERIKA CLEMONS (CP)...PRO/PER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person by daughter Erika Clemons ["Petitioner"].

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

- 1 No bond – person only.
- 2 Petitioner seeks medical powers. Medical Capacity Declaration, Sections 5 and 8 are incomplete. Need complete capacity declaration to include dementia attachments GC-313 and GC 335A.
- 3 Petitioner requests dementia powers; need appointment of counsel and report by same.
- 4 List of Required Contacts does not include petitioner. Need same.
- 5 Confidential Conservator Screening Form, Section 20 is incomplete and signature is not dated. Need complete screening form.
- 6 Need Court Investigator's Report.
- 7 Need return of Citation.
- 8 Need Certificate of Completion re Conservatorship Class.
- 9 Need Notice of Hearing and proof of service or Due Diligence Declarations as to siblings, Malik Beasle and Dominique Countee.**
- 10 ~Proposed Form Order/Letters 12/07/17.

RECOMMENDATION:

Court to appoint counsel then need to clear notes. If approved, set hearing for Compliance Review for **08/31/18** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination

of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

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.**

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: 01/16/18 TIME: 1:30 DEPT: S36P

CASE#: PRO PS1600076

CASE NAME: MTR OF VICKI ELAINE BENTON

SEE ALSO 21, 22, 23

HEARING:

Hearing Re: PTN for LETTERS OF ADMINISTRATION D ZARICH

COUNSEL:

DAVID J ZARICH

(OBJ)...PHYLLIS M GALLAGHER

JASON W BENTON

(PET)...THOMPSON & COLEGATE

VICKI ELAINE BENTON

(DEC)...

XREF: SPRSS05436 (Lois Jane Zarich)

GENERAL INFORMATION:

Continued from **03/16/16 and 05/19/16**. Matter is contested.

Ex Parte orders granted as modified on 08/03/16, limited authority, no bond. Court authorizes the special administrator to maintain the real property, manage the two properties, address code violations, and secure/marshal personal property of decedent. Special Administrator is to notify David Zarich, 24 hours before coming to the property and inform him of the purpose of the visit.

Continued from **10/18/16, 01/10/17, 04/20/17, 06/14/17, 08/16/17 and 11/15/17**.

THIS CASE IS SET FOR HEARING ON

- Petition 1 - Petition for Letters of Administration with full authority under IAEA by Jason Benton, son.
- Petition 2 - Petition for Letters of Administration with **limited** authority under IAEA by David Zarich, brother.

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

Petitioner 1 - Jason Benton, son

1. Petitioner is the sole heir and waives bond.
2. **Objections filed by David Zarich, brother, on 04/15/16. Competing petition filed to be heard 06/14/17.**
3. **Response filed by Jason on 05/12/16.**
4. ~Proposed form order: 1/28/16

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.

Petitioner 2 - David Zarich, brother

5. Petitioner seeks limited authority. There appears only real property. No bond appears ok until real property sells.
6. No proposed order.

RECOMMENDATION:

Matter is contested; petitioner 1 appears to have higher priority per Pr.C. § 8461. If approved, set hearing for Accounting/Status Review on **03/27/19**. Any accounting to be filed at least 30 days in advance. Note Local Rule requirements.

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 01/16/18 TIME: 1:30 DEPT: S36P

CASE#: PRO PS1600076

CASE NAME: MTR OF VICKI ELAINE BENTON

SEE ALSO 20, 22, 23

HEARING:

Hearing Re: PETITION FOR LETTERS OF ADMINISTRATION

COUNSEL:

DAVID J ZARICH

(OBJ)...PHYLLIS M GALLAGHER

JASON W BENTON

(PET)...THOMPSON & COLEGATE

VICKI ELAINE BENTON

(DEC)...

XREF: SPRSS05436 (Lois Jane Zarich)

See notes #20.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 01/16/18 TIME: 1:30 DEPT: S36P

CASE#: PRO PS1600076

CASE NAME: MTR OF VICKI ELAINE BENTON

SEE ALSO 20, 21, 23

HEARING:

Mandatory Settlement Conference

COUNSEL:

DAVID J ZARICH	(OBJ)...PHYLLIS M GALLAGHER
JASON W BENTON	(PET)...THOMPSON & COLEGATE
VICKI ELAINE BENTON	(DEC)...

XREF: SPRSS05436 (Lois Jane Zarich)

No notes – MSC.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/16/18 TIME: 1:30 DEPT: S36P

CASE#: PRO PS1600076

CASE NAME: MTR OF VICKI ELAINE BENTON

SEE ALSO 20, 21, 22

HEARING:

Petition for BY CLAIMANT TO DETERMINE OWNERSHIP OF ESTATE PROPE
RTY AND FOR ORDER AUTHORIZING TRANSFER ETC

COUNSEL:

DAVID J ZARICH (OBJ)...PHYLLIS M GALLAGHER
JASON W BENTON (PET)...THOMPSON & COLEGATE
VICKI ELAINE BENTON (DEC)...

XREF: SPRSS05436 (Lois Jane Zarich)

GENERAL INFORMATION:

Continued from 12/06/16 and 01/10/17 for personal service.

Continued from 03/14/17, 04/20/17, 06/14/17, and 08/16/17 to be heard with other matters.

THIS CASE IS SET FOR HEARING ON Petition to Determine Ownership of Estate Property and for Order Authorizing and Directing Transfer of Property [Pr. C. § 850] by David Zarich.

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

1. Petitioner, David J. Zarich, is decedent's brother and claims a portion of the real property located at 345 S. Pampas Ave., Rialto, CA 92376. Petitioner claims and alleges that a share of the property listed in the Administrator's (Jason Benson) Inventory and Appraisal belongs to Petitioner.
2. Petitioner proffers a document described as "Statement to share profits re David Zurich," [see petition filed 10/13/16 – LF, p. 6] which reflects a document agreeing to give David J. Zurich a one-fifth share of the profits upon the sale of the residence. A Jurat is affixed [see petition filed 10/13/16 – LF, p. 7] which is not completed or notarized with a signature purported to be that of Decedents.
3. Petitioner indicates that since Decedent's demise, Petitioner has received neither money, nor assurances that he will receive his share, or anything of value from the Decedent or from her estate. Instead, Petitioner alleges being

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.**

harassed by Jason W. Benton and told that he must vacate the premises, which has been Petitioner's home for more than 50 years.

4. Petitioner requests this Court determine that Petitioner is the true owner of a portion of the subject property; and to authorize and direct Administrator to transfer the portion of the property claimed, to the Petitioner.
5. Proof of Personal Service filed 11/23/16 does not include notice. Need proper notice.
6. **Objections filed 01/06/17 by Jason Benton (son of decedent) alleges that based on the arguments and allegations of Mr. Zarick, he may have a beneficial interest of some sort in the property at 345 S. Pampusa Avenue. However, he does not provide any evidence of an ownership interest or provide a calculable claim against the equity in the property.**
7. Supporting declaration filed by Petitioner and Vicki Benton on 01/05/17.

RECOMMENDATION:

Set for contested hearing.

(nb/lc/lh/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/16/18 TIME: 1:30 DEPT: S36P

CASE#: SPR SS05436

CASE NAME: EST OF LOIS JANE ZARICH

HEARING:

Motion Re: NTC OF MTN & MTN TO SET ASIDE ORDR DATED 01/23/04

Filed by Respondent DAVID J ZARICH

COUNSEL:

DAVID J ZARICH

(RES)...PHYLLIS M GALLAGHER

LOIS JANE ZARICH

(DEC)...

VICKI BENTON

(PET)...ELISABETH KEMPE-OLINGER

XREF: PROPS1600076 (Vicki Elaine Benton)

No notes – JTD

(LR)

Superior Court of Calif, County of San Bernardino
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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY **PROBATE**

DATE: 01/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS0600080

CASE NAME: DONALD H ROSE

HEARING:

THIRD Account and Report of LYLE STOTELMYRE and Petition for allowance of fees filed.

COUNSEL:

DAMON T ROSE	(KERENDIAN & ASSOCIATES
DAMON T ROSE	(PET)...NOREEN T FONTAINE
DAMON T ROSE	(PET)...PRO/PER
DONALD H ROSE TRUST	(TRU)...
KERENDIAN & ASSOCIATES, INC.	(PET)...SHAWN S KERENDIAN
LYLE STOTELMYRE	(PET)...M DANIEL SAYLOR
NOREEN T FONTAINE	(PET)...NOREEN T FONTAINE
SHAWN S KERENDIAN	(PET)...SHAWN S KERENDIAN
SOHEILA AZIZI & ASSOCIATES, P.	(PET)...NOREEN T FONTAINE
SVEN E ROSE	(OBJ)...BRIAN J SIMPSON
SVEN E ROSE	(PET)...BRIAN J SIMPSON

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

XREF: PROPS0900631 (Donald H Rose)

GENERAL INFORMATION:

Trust beneficiary, Damon T. Rose, passed away on 06/26/17.

THIS CASE IS SET FOR HEARING ON Third Account Current by Trustee/PPF, Lyle Stotelmyre ["Petitioner"] and Petition for Fees.

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

1. Accounting period 07/08/15 to 07/10/17.
2. Assets on Hand \$1,302,806.41 consisting of \$52,806.41 in cash and remaining in real and personal property.
3. No current bond. Suggest bond in the amount of \$1,576,000.00. JTD.
4. Trustee requests compensation of \$18,425.50. Billed at rates not exceeding \$125/hour for services rendered. Itemized [LF, pgs. 18-38]. JTD.

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.

5. Attorney requests fees of \$19,981.00. Billed at \$375/hour for 48 hours' attorney time and \$140/hour for 14.15 hours' paralegal time. Itemized [LF, pgs. 40-50]. JTD.
6. Disbursements – Schedule C [LF, p. 11] includes postage totaling \$27.30 which is normally considered overhead. Does Court wish to reduce fee request by same? JTD.
7. Proposed Order 09/21/17 does not include bond.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Fourth and Final Account in **60 days.**

(nb)

Future Hearing:

03/13/18 Petition for Instructions by Lyle etc.

Superior Court of Calif, County of San Bernardino
Page: 1A ADD ON
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 01/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1300979

CASE NAME: MTR OF IMOGENE J HAMILTON

SEE ALSO 1B

HEARING:

Petition for PRELIMINARY DISTRIBUTION

COUNSEL:

CONSTANCE L HAMILTON	(PET)...WILLIAM R REMERY
IMOGENE J HAMILTON	(DEC)...
INHERITANCE FUNDING COMPANY IN	(STEVEN D SCHROEDER
LARRY E HAMILTON	(PET)...GUAGENTI & DAMSKY
SYLVESTER HAMILTON JR	(TP)...GEORGE M HALIMI

GENERAL INFORMATION

Continued from 12/28/17. Constance Hamilton's broker not present as previously ordered. Mr. Damsky reports he has spoken with Mr. Remery and has was counsel for limited purpose and is no longer representing anyone in this matter. The Court orders a substitution of attorney be filed. Constance Hamilton's objection to sale to be filed and served within one week.

THIS CASE SET FOR HEARING ON Petition for Preliminary Distribution Pr.C. § 11620 by Larry Hamilton, son.

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

1. Letters Testamentary issued to Larry Hamilton, son on 10/27/15 and again on 03/14/16; full authority \$744,100 bond.
2. Executor seeks preliminary distribution of \$100,000 to each of the 6 heirs, subject to their previous assignments of interest. Inventory and Appraisal indicates \$798,396.80 in assets. See next note.
3. **NOTE:** there does not appear to be an accounting review set for administration.
4. **Need Substitution of Attorney as directed by Court on 12/28/17.**
5. **No written objections.**

RECOMMENDATION

Court's discretion. Set Accounting review for **07/26/18**.

(lc/nb)

Superior Court of Calif, County of San Bernardino
Page: 1B ADD ON
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 01/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1300979

CASE NAME: MTR OF IMOGENE J HAMILTON

SEE ALSO 1A

HEARING:

Report Sale and Petition for Order Confirming Sale of Real Property.

COUNSEL:

CONSTANCE L HAMILTON	(PET)...WILLIAM R REMERY
IMOGENE J HAMILTON	(DEC)...
INHERITANCE FUNDING COMPANY IN	(STEVEN D SCHROEDER
LARRY E HAMILTON	(PET)...GUAGENTI & DAMSKY
SYLVESTER HAMILTON JR	(TP)...GEORGE M HALIMI

Continued from 12/13/17 for additional bond and beneficiary request to purchase property. Broker to be present and 10% deposit at next hearing.

Continued from 12/13/17. Deposit of additional bond amount and beneficiary requests opportunity to purchase property. Beneficiary to have broker present and 10% deposit next hearing.

Address	1044 N. Turner Avenue, #208, Ontario, CA 91764 APN 0210-432-24-0000
Appraised value	\$330,000.00
Sale price	\$320,000.00
Deposit	\$9,600, insufficient. Deposit of 10% of \$32,000 is required absent special circumstances per local rule 20-807(a).
Commission	Need verified supplement clarifying terms of contract for commission entered into with Evelyn Arnold, Excellence Realty.
Additional bond	Petitioner states \$744,100.00 bond is sufficient.

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.**

Reason for sale Expenses of administration

Exposure to market MLS (Multiple Listing Service), marketing and advertising.

Notice Given.

~Proposed Form Order: 10/18/17
(lh/lc/nb)

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.**

Superior Court of Calif, County of San Bernardino

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

DATE: 01/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500038

CASE NAME: MTR OF EPHRAIM J LINCOLN

HEARING:

Hearing re Final Discharge

COUNSEL:

DIMITRI LINCOLN	(TP)...THOMAS W DOMINICK
EPHRAIM J LINCOLN	(DEC)..
JOSHUA LINCOLN	(MIN)...PRO/PER
SANDRA SIMMONS	(PET)...PRISCILLA C SOLARIO

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Settling First and Final Account entered 04/18/17.
2. Need receipts from Sandra Simmons, Priscilla C. Solario and Joshua Lincoln.
3. Need Ex-parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 3

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 01/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500738

CASE NAME: MTR OF DORIS ANNE SUNDEEN

HEARING:

Accounting Review

COUNSEL:

DONALD HEMPSTEAD

(PET)...KATHRYN A FLANIGAN

DORIS ANNE SUNDEEN

(DEC)...

MARJORIE SUNDEEN HUMPSTEAD

(PET)...H. BROOKS TRAVIS

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review (re Successor Administrator, nephew Donald Hempstead)

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

1. Letters of Successor Administration issued 11/08/16, full authority, no bond.
2. Need final inventory and appraisal.
3. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 01/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500858

CASE NAME: ROSEMARY FAULCONER

HEARING:

Hearing re Final Discharge

COUNSEL:

JAMES MILTON MCCAIN

(PET)...DAVID E JACOBS

JENNIFER BELOTT

(TP)...THOMAS A. GROSSMAN

ROSEMARY FAULCONER

(DEC)...

SHARLOTE HALLFORD

(THOMAS A. GROSSMAN

VACATE – Final Discharge Order entered 02/16/17.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1501018

CASE NAME: ROY E BRANSON

HEARING:

Hearing Re: FILING OF FINAL INVENTORY AND APPRAISAL

COUNSEL:

DONNA L CARLSON (PET)...BRYAN C HARTNELL
ROY E BRANSON (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Inventory and Appraisal.

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

- 1 Matter set at 10/17/17, wherein the Court indicates that if the inventory and appraisal is filed timely, the hearing will go off calendar.
- 2 Partial No. 1 inventory filed 09/13/16. Need final inventory and appraisal.

RECOMMENDATION:

Inquire status.

(nb)

FUTURE HEARING DATES:

07/17/18 Probate status report filed.

Superior Court of Calif, County of San Bernardino

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

DATE: 01/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600038

CASE NAME: ESTATE OF ELDON C HALL

HEARING:

Second and final Account and Report of VICKIE R BLACK and
Petition for allowance of fees filed.

COUNSEL:

ELDON C. HALL JR. (DEC)...
VICKIE R BLACK (PET)...MARY E MULLIN
VICKIE R. MULLIN (PET)...MARY E MULLIN

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Second and Final Account and Petition for Fees by Administrator, Vicki R. Black ["Petitioner"].

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

1. Assets on Hand \$200,693.43 consisting of \$198,193.43 in cash and remaining in real property.
2. Statutory fees of \$7,549.82 requested. Calculated.
3. Attorney requests extraordinary fees of \$5,930.25 for services rendered in connection with the sale of real property. Billed at \$300/hour for 13.30 hours' attorney time and \$190/hour for 9.95 hours paralegal time. Itemized [LF, pgs. 33-36]. JTD.
 - a. Paralegal rate exceeds the community standard rate of \$150/hour.
4. Petitioner requests authority to withhold the sum of \$3,000 for closing costs.
5. Disbursements – Schedule D [LF, pgs. 21-22] reflects various "reimbursements" to petitioner that are not specific. Need verified supplement.
6. Allowance of Creditor's Claim by Personal Representative entered 04/22/16. Question whether petitioner has been compensated? Need verified supplement.
7. Need bank/financial statements to support date of death and ending balances per Local Rule 20-908.
8. Proposed Order 10/03/17 does not include findings re sole and separate property; or address of heirs receiving real property.

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.**

RECOMMENDATION:

Need to clear notes 5-7 then Court's discretion. If approved, set next hearing for receipts and final discharge for **01/22/19**.

(nb)

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.**

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 01/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700458

CASE NAME: MARIE T. KNOTT LIVING TRUST

SEE ALSO 8

HEARING:

Petition for OBJECTIONS TO TRUSTEE'S ACCOUNT DATED 01/24/17
PETITION FOR RELIEF, SURCHARGE, AND REMOVAL ETC

COUNSEL:

ALBERT KNOTT	(PET)...L'TANYA M BUTLER
MARIE T KNOTT LIVING TRUST DAT	(TRU)...
SHRINERS HOSPITALS FOR CHILDRE	(PET)...KEITH L MEEKER

Currently under review by legal research.

(LR)

Superior Court of Calif, County of San Bernardino

Page: 8

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 01/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700458

CASE NAME: MARIE T. KNOTT LIVING TRUST

SEE ALSO 7

HEARING:

FIRST Account and Report of ALBERT KNOTT and Petition for allowance of fees filed.

COUNSEL:

ALBERT KNOTT	(PET)...L'TANYA M BUTLER
MARIE T KNOTT LIVING TRUST DAT	(TRU)...
SHRINERS HOSPITALS FOR CHILDRE	(PET)...KEITH L MEEKER

GENERAL INFORMATION

Continued from 12/07/17 at request of counsel. Attempting settlement. Notice to be given by Mr. Meeker.

THIS CASE SET FOR HEARING ON 1st Account Current and Report of Successor Trustee Albert Knott Jr.

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

1. Albert Knott Jr. was appointed successor Trustee concurrently as Albert Knott Sr. was removed on 09/09/97; Los Angeles County.
2. Accounting period 09/09/97 – 09/30/17.
3. Assets on hand \$940,956.78 of which \$246,804.53 is cash.
4. Trustee inadvertently overpaid himself \$137,122.92 in distribution and owes the Trust. Trustee proposes to rectify overpayment by placing balance of Trust funds in a blocked account and having Trust purchase a life insurance policy of \$250,000 to have Trust beneficiary.
5. Trustee alleges that prior Trustee, Albert Sr., exhausted any liquid capital held by trust prior to abandoning his family and Trustee duties. Therefore, the only remaining asset was the real property.
6. Real property in Redondo Beach was sold 06/28/16 for \$1,300,000 and real property in Rancho Cucamonga was purchased for \$650,000.
7. **Objections filed by Shriners Hospital on 10/19/17.**
8. No proposed order. Submit after hearing.

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.

RECOMMENDATION

Matter is contested. If approved and Court takes jurisdiction of trust, set next Accounting review for **12/13/18**.

(lc/nb)

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.**

Superior Court of Calif, County of San Bernardino

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

DATE: 01/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700858

CASE NAME: MTR OF ELEANOR WILLIS

HEARING:

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

COUNSEL:

ELEANOR WILLIS (DEC)...
PAUL WILLIS (PET)...MARK STEPHEN SMITH

GENERAL INFORMATION:

Continued from 11/28/17 at request of counsel. Notice to be given by Mr. Smith.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by son, Paul Willis ["Petitioner"].

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

1. Section 8 to petition [LF, p. 5] does not include relationships to decedent and does not include petitioner. Need verified supplement.
2. Petition alleges all heirs waive bond for estate estimated at \$81,000. Need Mandatory Waivers of Bond by Heir or Beneficiary, form DE-142/DE-111 by petitioner. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. §8481(c).
3. Waivers of Notice of Probate, Publication and Estate affixed to petition [LF, pgs. 6, 8] are barely legible. However, notice and publication are required per code.
4. Need proof of publication per Pr. C. §8121.
5. Need Notice of Petition Administer Estate [DE-121] with proof of service per Pr.C. §8110.
6. Need Duties and Liabilities of Personal Representative form.

RECOMMENDATION:

Need to clear notes 1-2, 4-6 then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **03/26/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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.**

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 01/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700937

CASE NAME: THOMAS SCOTT

HEARING:

Petition to Determine Succession to Real Property

COUNSEL:

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

X-REF PROPS 1700913 (Barbara J. Scott - date of death 11/12/17)

GENERAL INFORMATION:

Decedent passed away on 01/01/88.

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by daughter Merrie C. Scott ["Petitioner"].

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

1. Petitioner requests a determination that decedent's 50% interest in real property located in San Bernardino County pass to petitioner without administration. Petitioner is decedent's issue and purported sole heir per intestate succession. Does Court wish to require a copy of vesting document? JTD.
2. ~Proposed Form Order 10/06/17.

RECOMMENDATION:

Court's Discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 01/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700938

CASE NAME: JIMMY AND DAISY MALORNI REVOC. FAMILY TRUST

HEARING:

Hearing Re: PETITION FOR ORDER CONFIRMING SUCCESSOR TRUSTEE

COUNSEL:

JIMMY AND DAISY MALORNI REVOCA (TRU)...

VINCENT JUNIOR MALORNI

(PET)... EDWARD S.INOUYE

Currently under review by Legal Research.

(LR)

Notice:

Need Notice of Hearing with proof of service to issues/beneficiaries, Pat Pasquale Malorni; and Ann Antonetti Fehmie.

(nb)

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.**

Superior Court of Calif, County of San Bernardino

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

DATE: 01/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701229

CASE NAME: ESTATE OF DAVID M. ANDERSON

HEARING:

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

COUNSEL:

DAVID M ANDERSON	(DEC)...
KIMBERLY C DAVIS	(PET)...CURTIS R AIJALA
RAYMOND WEIJLAND	(PET)...CURTIS R AIJALA

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by friends, Kimberly C. Davis and Raymond Weijland ["Petitioners"].

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

1. Section 8 to petition [LF, p. 5] does not include petitioners. Need verified supplement.
2. Decedent was survived by issues and siblings who would have higher priority than petitioners. However, parties have been noticed.
3. Petitioners request bond in the amount of \$775,084.89 be fixed. Appears sufficient. JTD.
4. Need proof of publication.
5. ~Proposed Form Order/Letters 12/07/17.

RECOMMENDATION:

Need to clear notes 1-3 the Court's discretion re: bond. If approved, set future hearing for Accounting Review on **03/26/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino
Page: 12A ADD ON
CIVPRO San Bernardino District - Civil
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 01/16/18 TIME: 9:30 DEPT: S37P

CASE#: CIF DS1700139

CASE NAME: COLVIN VS LOPEZ INGEZ

HEARING:

Hearing Re: ELDER ABUSE RESTRAINING ORDER

COUNSEL:

EDDIEBERTO LOPEZ INGEZ (RP)...
SANTA COLVIN (PP)...PRO/PER

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE
EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

Need Notice with proof of service on Eddieberto Lopez Ingez.
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 01/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS0800089

CASE NAME: MARCIA F HAMMOND

HEARING:

Accounting Review

COUNSEL:

BARRY HAMMOND

(CP)...PRO/PER

BARRY HAMMOND

(CPE)...PRO/PER

MARCIA F HAMMOND

(CEP)...

GENERAL INFORMATION

Continued from 09/12/17 at request of Petitioner. Accounting to be filed by 12/12/17. Nothing new filed.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Second Account for Barry Hammond approved on 03/21/17 for period ending 04/30/15. Need Order Settling Second Account.
2. Need accounting or waiver.

RECOMMENDATION

Inquire status

(cs/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 01/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1300047

CASE NAME: ALAN S. GILHAM

HEARING:

Third Account and Report of INLAND COUNTIES REGIONAL CENTER,
INC. and Petition for allowance of fees filed.

COUNSEL:

ALAN S GILHAM

(CEP)...

INLAND COUNTIES REGIONAL CENTE

(CE)...LAYNE A BARTHOLOMEW

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Third Account Current and Report of SNT and
Petition for Approval of Trustee's Fees and Attorney's Fees by Trustee, IRC
["Petitioner"].

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

1. Accounting covers 09/01/15 to 08/31/17.
2. Assets on hand: \$38,849.59 in cash held in a pooled investment fund.
3. Current bond of \$78,000. Petitioner requests bond be decreased to \$43,000.
Appears sufficient. JTD.
4. Petitioner requests approval and ratification of trustee fees already taken by
Master Trust of California in the amount of \$1,844.87. Billed at \$1,000 for the
first \$50,000; 2% of the next \$250,000; 1.65% of the next \$450,000 and 1.50%
of the next \$250,000.
5. Petitioner requests authority to allow Master Trust to continue taking its annual
fee in quarterly payments according to its fee schedule dated 06/13/17 [LF, p.
60]. JTD
6. Attorney Bartholomew requests fees of \$805. Billed at the rate of \$250/hour for
1.5 hours' attorney time and \$100/hour for 4.3 hours' paralegal time. Itemized
[LF, p. 51].
7. Petitioner has paid Intelligent Minds and Community Care for Companion
Services during this accounting period. Need verified declaration(s) to verify
dates of service, performance of services and that payment has been received
per Local Rule 20-1406(c).

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.**

8. Petitioner requests authority to amend the trust to add Medicaid Language provisions as a new Article Nine of the trust. JTD.
9. Due to the low value of this trust, petitioner requests that the court order biennial accountings. JTD.
10. ~Proposed Order 11/29/17.

RECOMMENDATION

Need to clear note 7 then Court's discretion re bond and trust amendment. If approved, set hearing on the next Accounting Review for or **10/30/18** (if one year) or biennial for **10/29/19** (if two years). Account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400129

CASE NAME: Gregory Jess Atoigue Maratita

HEARING:

Hearing Re: TEXAS CONSERVATORSHIP

COUNSEL:

AVELINA A MARATITA (CP)...PRO/PER
GREGORY JESS T MARATITA (CP)...PRO/PER
GREGORY JESS ATOIGUE MARATITA (CTP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Texas Conservatorship

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

1. Matter set on Court's motion after receipt and review of CI report filed 10/26/17 to determine whether a conservatorship has been established in Texas.
2. Conservators ordered to appear at hearing and may appear via CourtCall.
3. Need to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).
4. Notice by Judicial Assistant.

RECOMMENDATION:

Need to clear note 3 then Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 01/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400219

CASE NAME: ENRIQUE CAMACHO JR

HEARING:

Hearing Re: VOTING RIGHTS

COUNSEL:

ENRIQUE CAMACHO (CP)...PRO/PER

ENRIQUE CAMACHO JR (CEE)...

MARIA CAMACHO (CP)...PRO/PER

XREF: CONPS1400218 (Francisco Camacho)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Voting Rights

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

1. Matter set on Court's motion on 12/05/17 after receipt and review of Court Investigator's report dated 11/15/17.
2. Notice by Judicial Assistant.

RECOMMENDATION:

Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600090

CASE NAME: NAJLA FORD

HEARING:

Petition for Attorney's Fees and Costs by Marc B. Hankin

COUNSEL:

CHARLES NAJJAR	(PET)...MARC B HANKIN
ISABELLA PLACENTIA	(PRO/PER
JACOB NIXA	(PRO/PER
JOHN MOIO	(CPE)...MARC B HANKIN
JOHN MOIO	(PET)...MITCHELL I ROTH
JORDAN NIXA	(PRO/PER
MARC B HANKIN	(PET)... MARC B HANKIN
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
NAJLA FORD	(CEP)...PRO/PER
NAJLA FORD	(PET)...SANDY L. TURNER
NAJLA FORD	(PP)...MITCHELL I ROTH
NATALIE BLICKENSTAFF	(CE)...JENNIFER M DANIEL
NATALIE BLICKENSTAFF	(CPE)...JENNIFER M DANIEL
SANDY TURNER	(PET)...SANDY L. TURNER
TINA NIXA	(JEREMIAH RAXTER
TINAMARIA A NIXA	(CP)...PRO/PER

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

VACATED per register of actions.

(nb)

Superior Court of Calif, County of San Bernardino
Page: 17A ADD ON
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 01/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700338

CASE NAME: MTR OF VICTOR OLIVARES, JR
SEE ALSO 17B

HEARING:
Hearing Re: RECEIPT OF BOND

COUNSEL:
ORFELINDA OLIVARES (CPE)...LAW OFFICE OF JOHN R RAMOS
VICTOR OLIVAREZS JR (CEP)...CANDICE A GARCIA-RODRIGO

X-REF: FAMSS 1704023
GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Receipt of Bond

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

1. Matter set at 12/28/17 hearing, wherein, the Court required a bond in the sum of \$65,000. Need same.

RECOMMENDATION:
Need proof of bond.
(nb)

Future Hearing:
08/02/18 Compliance review hearing
03/07/19 Accounting Review.

Superior Court of Calif, County of San Bernardino
Page: 17B ADD ON
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 01/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700338

CASE NAME: MTR OF VICTOR OLIVARES, JR
SEE ALSO 17A

HEARING:
Hearing Re: EVICTION/DEFAULT JUDGMENT

COUNSEL:
ORFELINDA OLIVARES (CPE)...LAW OFFICE OF JOHN R RAMOS
VICTOR OLIVAREZS JR (CEP)...CANDICE A GARCIA-RODRIGO

Request for Waiver of Court Fees and Costs filed by VICTOR OLIVAREZS JR is GRANTED

X-REF: FAMSS 1704023

No notes – Judge to decide.
(nb)

Future Hearing:
08/02/18 Compliance review hearing
03/07/19 Accounting Review.

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 01/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700448

CASE NAME: CALVIN DAMON FORD

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CALVIN DAMON FORD	(CEP)...SHEASBY, CHO AND MIDDLETON
GIORDON P FORD	(CE)...
MAXINE E FORD	(CP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Mother Maxine E. Ford, appointed temporary conservatorship of the person on 12/13/17; brother, Giordon P. Ford appointed temporary conservator of the estate on 12/13/17, \$20,000 bond. Amended order entered 12/15/17. Court appoints Mitchell I Roth as GAL. Temporary conservator(s) are ordered to have conservatee medically evaluated at Reche Canyon Rehabilitation Center today. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by mother Maxine E. Ford and son, Giordon P. Ford ["Petitioners"].

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

1. Current temporary bond in the amount of \$20,000 fixed. However, estimated value of the estate is 'unknown.' JTD.
2. Petitioner seeks medical powers. Need Medical Capacity Declaration.
3. Need report by GAL, Mitchell I Roth.
4. Need Court Investigator's Report.
5. Need return of Citation.
6. Need Duties of Conservator and Acknowledgment of Receipt of Handbook form.
7. Need Notification to Court Address of Conservatorship form.
8. Court to review Conservatorship Screening Form by Maxine. Also, section 18 is incomplete. Need verified supplement.
9. Section 18 to Conservatorship Screening Form by Giordon is incomplete. Need verified supplement.
10. Need Notice of Hearing and proof of service.
- 11. Certificates of Completion re: Conservatorship Class filed.**
12. Court-ordered evaluation filed 12/14/17.

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.

13. Petitioner requests an Order authorizing the general Conservator or the Estate the authority to operate the business known as "Sabbath R. Trucking."
14. No proposed order/letters. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 2-10 then Court's discretion re: bond. If approved, set hearing for Compliance Review for **08/31/18** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; and recordation of letters if applicable per Pr.C.§2313.

Set hearing re: Accounting Review for **03/26/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 01/16/18 TIME: 9:30 DEPT: S37P

CASE#: SC SS01239

CASE NAME: IN THE MATTER OF HAZEL MARIE T MENDOZA

HEARING:

Hearing Re: VOTING RIGHTS

COUNSEL:

DARWIN T MENDOZA	(PET)...PRO/PER
FRED JOSE	(PET)...PRO/PER
HAZEL MARIE MENDOZA	(CEE)...WALTER T. MOORE
MARY JOSE	(PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Voting Rights

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

1. Matter set on Court's motion on 12/05/17 after receipt and review of Court Investigator's report dated 11/17/17.
2. Notice by Judicial Assistant.
3. **Returned mail received on 01/09/18.**

RECOMMENDATION:

Court's discretion.

(nb)