



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 01/23/18**

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.

nb0103/0117

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PROBATE**

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DATE: 01/23/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1701142

CASE NAME: REEDY DEREK HALL

HEARING:

Hearing Re: RESTRAINING ORDER

COUNSEL:

LELA MARIA HALL

(PET)...MICHAEL C MADDUX

REEDY DEREK HALL

(DEC)...

**Continued from 12/26/17. Court Call authorized for Jennifer Jana. Preliminary Injunction remains in effect pending next hearing.**

No notes – Judge to decide.  
(nb)

Future Hearing:  
03/05/19 Accounting Review.

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

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 01/23/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1701222

CASE NAME: ESTATE OF VONDRA L. DAY

HEARING:

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

COUNSEL:

THOMAS H DAY JR (PET)...D M DAVIS  
VONDRA L DAY (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by son and named Executor, Thomas H. Day, Jr. ["Petitioner"].

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

1. Notice does not include grandson, Tyler W. Day. Need proper service.
2. Section 8 does not include grandson, Tyler W. Day, disinherited in Will. Need verified supplement.
3. Need proof of publication.
4. 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(b).
5. ~Proposed Form Order/Letters 12/01/17.

RECOMMENDATION:

Need to clear notes 1-3. If approved, set future hearing for Accounting/Status Review on **04/12/19**. Any account to be filed 30 days in advance. 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

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DATE: 01/23/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1701223

CASE NAME: ESTATE OF EUSTAQUIO RAMIREZ

HEARING:

Spousal Property Petition hearing.

COUNSEL:

EUSTAQUIO V RAMIREZ (DEC)...  
SILVIA ORTEGA GONZALEZ (PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Silvia Ortega Gonzalez ["Petitioner"].

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

1. Need Notice of Hearing with proof of service.
2. Section 7b to petitioner [LF, p.3] is marked. However, Section 1b is not. Question whether petitioner also seeks confirmation of properties? Need verified supplement.
3. Petitioner requests a determination of property passing to the surviving spouse as community property. Specifically, real property located in Barstow and Hesperia in San Bernardino County. Petitioner indicates parties were married on 06/20/89 and property interests were acquired with community funds. Copies of Exhibits B and C are not affixed as alleged. Need same via verified supplement.
4. Attachments 7a & 7b [LF, pgs. 10-11] reflect petitioner is seeking a 50% interest in real properties. Suggest Court require vesting documents.
5. Decedent died intestate with 2 issues who would also share a two-thirds distribution in the estate per Pr.C. §6401 if the real property is separate property of decedent. However, notarized Affidavits by issues have been filed on 12/05/17, in favor of petitioner.
6. ~Proposed Form Order 12/05/17.

RECOMMENDATION:

Need to clear notes 1-4 then Court's discretion.

(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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

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DATE: 01/23/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS0900230

CASE NAME: PEGGY BROADHEAD

HEARING:

Hearing Re: STATUS OF SB2628

COUNSEL:

PEGGY BROADHEAD

(CTP)...JAMES B CHURCH

RENEE DIAMOND

(PCR)...CHRISTOPHER A POULOS

RENEE DIAMOND

(TEE)...CHRISTOPHER A POULOS

THE PEGGY BROADHEAD SPECIAL NE (TRU)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status of SB2628

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

1. Order Settling Third Account Current entered 02/27/17; account now due beginning 08/01/16.
2. No account or waiver of account. 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

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DATE: 01/23/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1500066

CASE NAME: MTR OF DAVID C JOHNSON

HEARING:

Second & Final Account and Report of CHRISTINA ERICKSON-TAUBE  
and Petition for allowance of fees filed.

COUNSEL:

CHRISTINA ERICKSON-TAUBE	(PET)...SHERRI L KASTILAHN
DAVID JOHNSON	(PET)...CHRISTOPHER D MCINTIRE
JONI HAATVEDT	(CPE)...HORSPOOL & HORSPOOL
JONI T HAATVEDT	(CPE)...PRO/PER
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
SUSI PAYNE	(OBJ)...CHRISTOPHER D MCINTIRE
SUSI PAYNE	(PET)...CHRISTOPHER D MCINTIRE

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

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Second and Final Account of Conservator of the Person and Estate; Successor Trustee; and PPF, Christina Erickson-Taube ["Petitioner"] and Petition for Fees.

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

1. Conservatorship accounting period 10/01/16 to 10/31/17.
2. Conservatorship Assets on hand \$0.00.
3. Petitioner has not used mandatory Summary of Account (GC-400/405). Court may wish to direct petitioner to use the new mandatory form(s) on future accountings
4. Trust accounting period 10/01/16 to 10/31/17. .
5. Trust Assets on hand \$288,499.05 consisting of \$99,056.18 in cash and remaining \$189,442.87 in real and personal property.
6. Current bond of \$350,000 for both the conservatorship and trust assets.
7. Supplemental Inventory and Appraisal #5 filed on 05/15/17, sections 4 & 5 are incomplete and Attachment 2 does not include legal description of property;

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- APN #; and does not include findings re separate property. Need completed inventory.
8. Petitioner requests fees of \$15,201.80 for services as Conservator and Successor Trustee. Billed at \$65-\$115/hour. Itemized [LF, pgs. 61-73]. However, itemization does not include subtotals setting forth number of hours. Need verified supplement.
  9. Attorney requests fees of \$19,245.00. Billed at \$350/hour for 55.55 hours' attorney time. Itemized [LF, pgs. 74-79]. JTD.
  10. Receipts – Schedule “A” for Trust [LF, p. 30] does not include transfer from related conservatorship in the amount of \$3,282.59 reflected on Schedule “F”- Changes in the Form of Assets [LF, p19]. Need verified supplement.
  11. Need copies of investment/bank statements to support balances on hand per Local Rule 20-908 for Pacific Premier Bank Acct. #XXX8758 for months 08/2017 thru 10/2017 and Pacific Premier Bank Acct. #XXX0593 for months 08/2017 thru 10/2017.
  12. Need residential facility statements and/or written verification of rent per Pr.C. §2620(c) (5).
  13. During this accounting period, petitioner paid Lance Riley for care management services. Need verified declarations for acknowledgment of receipt of fees per Local Rule 20-1406(c).
  14. Petitioner requests an Order of the Court allowing distribution of the remaining assets pursuant to the terms and conditions of the Trust Agreement for equal distribution of all assets to the Trustor's 4 children.
    - a. Question whether distribution includes resolution of multiple claims as to items included in the Report to Court re Personal Property Distribution filed on 01/18/17?
    - b. Need executed copy of subject Trust Agreement.
  15. Petitioner requests bond exoneration and discharge. However, bond is not exonerated and discharge does not occur until entry of a final discharge order.
  16. Notice does not include Susan J. Hiatt or Attorney Horspool. Need proper service.
  17. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Need to clear notes 7-8 and 10-14. If approved, set next hearing for receipts and final discharge on **01/29/19**.

(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 01/23/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1700010

CASE NAME: Jenny Kim Ngan Phan

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of HOA TAN PHAN

COUNSEL:

HOA TAN PHAN	(PET)...PRO/PER
JENNY KIM NGAN PHAN	(CTP)...
NGA KIM TANG	(PET)...PRO/PER

GENERAL INFORMATION

Order appointing Ho Tan Phan and HGA Kim Tang Limited Co-Conservators entered 06/20/17.

THIS CASE IS SET FOR HEARING ON Inventory & Appraisal/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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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 01/23/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1700281

CASE NAME: ASHLEY DARLENE BIEN

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ASHLEY DARLENE BIEN	(CEE)...
DARLENE TRACY BIEN	(PET)...PRO/PER
RYAN P MEDINA	(PET)...PRO/PER

#### GENERAL INFORMATION

**Continued from 09/05/17.** Court indicates it does not require court appointed counsel, a limited petition; court has reviewed the IRC report (a copy was provided to court by the petitioner and returned after review). Court deems the proof of service affixed to notice of hearing as deemed dated the date of the filing. Court clears note re citation as Ashley Bien is present in court. Matter is continued for petitioners to file verified supplement addressing if Ryan Medina is requesting to be co-conservator (Ryan Medina states he is intending to be appointed as the co-conservator). Petitioners are also to attend the conservatorship training class and turn in copy of certificate to the court. Petitioners state that there are errors on the Court Investigator report as follows: that the minor is not going to Upland High School, she is going to Montclair High School; and that on page 6 that the last visit 2017.

**Continued from 11/28/17. Court set deadline for the filing of an amended petition for conservatorship of 11/28/17; if deadline is met, the clerks' office is ordered to set that amended petition for hearing on 01/23/18; if deadline not met, the clerks' office to set amended petition for next available Tuesday. Court indicates Darlene Bien's appearance is not required.**

THIS CASE SET FOR HEARING ON **AMENDED** (11/28/17) Petition for Appointment of Conservator person only by Darlene Bien (mother) and Ryan Medina (uncle)

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

1. Petitioner seeks medical powers. Capacity Declaration filed 07/20/17.
2. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, an IRC report is optional per Pr.C. 1827.5(b). **IRC report filed.**

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

3. Court Investigator report filed.
4. **Certificates of Completion re Conservator Class filed.**
5. **Need return of Citation.**
6. **Section 4a to proof of service, as to amended petition, is blank. Need proper service.**
7. ~Proposed Form Order/Letters: 07/20/17

#### RECOMMENDATION

Need to clear notes 5-6 then Court's discretion. If approved, set hearing for Compliance Review for **08/28/18** 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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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 01/23/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700372

CASE NAME: MATTER OF HECTOR MANUEL ANAYA

**SEE ALSO 8, 9**

HEARING:

Hearing Re: OSC RE DISMISSAL OF BOTH PETITIONS- CONSERVATOR

COUNSEL:

HECTOR MANUEL ANAYA (CTP)...PRO/PER

MARIA GUADALUPE ZEPEDA DE ANAY (CP )...PRO/PER

**VACATED** – request for dismissal entered 12/20/17.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 01/23/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1700372

CASE NAME: MATTER OF HECTOR MANUEL ANAYA

**SEE ALSO 7, 9**

HEARING:

Petition for Appointment of Temporary Conservator

COUNSEL:

HECTOR MANUEL ANAYA                      (CTP)...PRO/PER

MARIA GUADALUPE ZEPEDA DE ANAY (CP )...PRO/PER

Request for Waiver of Court Fees and Costs filed by MARIA GUADALUPE ZEPEDA DE ANAYA is GRANTED

**VACATED** - request for dismissal entered 12/20/17.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 01/23/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1700372

CASE NAME: MATTER OF HECTOR MANUEL ANAYA

**SEE ALSO 7, 8**

HEARING:

Petition for Appointment of Conservator

COUNSEL:

HECTOR MANUEL ANAYA                      (CTP)...PRO/PER

MARIA GUADALUPE ZEPEDA DE ANAY (CP )...PRO/PER

Request for Waiver of Court Fees and Costs filed by MARIA GUADALUPE ZEPEDA DE ANAYA is GRANTED

**VACATED** - request for dismissal entered 12/20/17.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 01/23/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1700392

CASE NAME: JOHN MANUEL FLORES JR

**SEE ALSO 11**

HEARING:

Hearing Re: OSC RE DISMISSAL OF PETITION FOR CONSERVATORSHIP

COUNSEL:

DARLINE YVETTE SMITH                      (CP )...PRO/PER

JOHN MANUEL FLORES JR                      (CTP)...

GENERAL INFORMATION:

**Continued from 12/05/17 due to non-appearance. Court continues hearing and sets OSC re Dismissal- court notes that if petitioner does not appear at next hearing, or have all probate notes cleared, court will dismiss petition at next hearing date. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON **OSC re Dismissal** of Petition for Limited Conservatorship, person only, by mother, Darline Yvette Smith ["Petitioner"].

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. 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.
4. Proposed limited conservatee's civil and legal rights are not to be limited without a court order.
5. Medical Capacity Declaration filed.
6. Citation returned SERVED.

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7. Section 11 to petition does not include sibling, Destinie Lozano. Need verified supplement.
8. List of Required Contact Information does not include petitioner. Need complete form.
9. Conservator Screening Form, section 2a; 2b; and 16 are blank. Need verified supplement.
- 10. Court Investigator Report filed.**
- 11. Inland Regional Center Report filed.**
12. Need Notice of Hearing with proof of service to include Inland Regional Center.
  - a. Due Diligence Declarations filed as to father and paternal grandparents. JTD.
13. Certificate of Completion re Conservatorship Class filed.
14. ~Proposed Form Order/Letters 10/24/17

**RECOMMENDATION:**

Court to appoint counsel then need to clear notes 2, 7-9 & 12. If approved, set hearing for Compliance Review for **08/28/18** 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)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 01/23/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1700392

CASE NAME: JOHN MANUEL FLORES JR

**SEE ALSO 10**

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DARLINE YVETTE SMITH                      (CP )...PRO/PER

JOHN MANUEL FLORES JR                      (CTP)...

Request for Waiver of Court Fees and Costs filed by JOHN MANUEL FLORES JR is GRANTED

See prior matter #10.

(nb)



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

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DATE: 01/23/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700442

CASE NAME: MTR OF DUANE R SHIER  
HEARING:  
PROBATE/CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:

DUANE R SHIER (CTP)...  
DUANE SCOTT SHIER (CP)...JOHN R GRIJALVA

GENERAL INFORMATION:

Duane Scott Shier appointed Conservator of the Person on 01/10/17.

THIS CASE IS SET FOR HEARING ON CMC re Transfer-In from Los Angeles County.

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

1. Need amended Letters
2. Need CI Report.
3. Dementia powers granted. Need appointment of counsel and report by same.
4. Capacity Declaration affixed to petition [LF, pgs. 14-16] filed in LA on 09/07/16 has the following deficiencies:
  - a. Caption is incomplete;
  - b. Sections 1 & 2 are incomplete;
  - c. Section 3 does not indicate physician has at least 2 years' experience in diagnosing dementia;
  - d. Date is missing at signature line;
  - e. Sections 8 and 10 do not indicate number of pages attached.Need completed Capacity Declaration.
5. Need to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).

RECOMMENDATION:

Court to appoint counsel then need to clear notes. If approved, set hearing for Compliance Review in **60 days** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C. §1830(c); 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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PA**

-----  
DATE: 01/23/18      TIME: 10:00      DEPT: S35P  
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CASE#: PRO DS1000272

CASE NAME: THOMAS E. WILKES

HEARING:

Accounting Review

COUNSEL:

KATHERINE FOTCH

(PET)...PRO/PER

PUBLIC ADMINISTRATOR

(PET)...CRAIG M PARKER

THOMAS E WILKES

(DEC)...

#### GENERAL INFORMATION

**Matter reset to this date on court's motion. Notice by Judicial Assistant.**

**Continued from 10/03/17 at request of counsel to file accounting due by 12/26/17.**

**Nothing new filed.**

THIS CASE SET FOR HEARING ON Accounting Review/Status.

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

1. Order on Report of Status entered on 09/20/16.
2. Need accounting or status report.

#### RECOMMENDATION

Inquire status

(cs/nb)

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

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DATE: 01/23/18 TIME: 10:00 DEPT: S35P  
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CASE#: PRO PS1100456

CASE NAME: LOUIS C GUZMAN

HEARING:

Probate status report filed.

COUNSEL:

CHRISTOPHER GUZMAN (PET)...PRO/PER  
LOUIS C GUZMAN (DEC)...  
PATRICK B WRIGHT ( )...  
PUBLIC ADMINISTRATOR (PET)...CRAIG M PARKER  
RAPHAEL A ROSEMBLAT (PET)...  
US SPECIALTY INSURANCE COMPAN (TP )...LANAK & HANNA

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report.

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 still needs to locate a buyer for the real property and to close the escrow thereon.
2. Petitioner requests an additional 12 months to close the estate.
3. ~Proposed Form Order 10/04/17.

RECOMMENDATION:

Courts discretion. If approved, set next hearing for Accounting Review on **08/28/17**.

(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 01/23/18      TIME: 10:00      DEPT: S35P  
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CASE#: PRO PS1400037

CASE NAME: MTR OF DAVID ALAN BOUCHER

HEARING:

Probate status report filed.

COUNSEL:

CHRISTIE REED	(APP)...PRO/PER
DAVID ALAN BOUCHER	(DEC)...
PUBLIC ADMINISTRATOR	(PET)...CRAIG M PARKER
STATE OF CALIFORNIA FRANCHISE	(TP )...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report.

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 has not yet been able to sell decedent's condo and needs additional time to sell and close escrow on the condo.
2. Petitioner requests an additional 12 months to close the estate.
3. ~Proposed Form Order 09/29/17 includes wrong judge

RECOMMENDATION:

Courts discretion. If approved, set next hearing for Accounting Review on **08/28/17**.

(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 01/23/18      TIME: 10:00      DEPT: S35P  
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CASE#: PRO PS1401128

CASE NAME: Jewell Nadine McAdams

**SEE ALSO 17**

HEARING:

Hearing Re: OSC RE SURCHARGE OF \$82,000.00 ON T. FREDRICKSON

COUNSEL:

D M DAVIS	(TP )...
JEWELL NADINE MCADAMS	(DEC)...
PUBLIC GUARDIAN	(COUNTY COUNSEL
TRACY FREDRICKSON	(PET)...PRO/PER

GENERAL INFORMATION:

**Continued from 12/12/17. Court hereby cancels Tracy Frederickson's ability to appear by CourtCall pursuant to CCP 367.5 for failure to comply with the court's previous orders. Court orders Tracy Fredrickson to personally appear at the next hearing on 1/23/18 at 10:00am. If Tracy Fredrickson Fails to Appear at the next hearing, the Court may double the surcharge amount.**

THIS CASE IS SET FOR HEARING ON OSC re Surcharge of \$82,000 on T. Fredrickson.

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

1. Matter set at 06/13/17, wherein, the Court issued a citation as to Tracy Frederickson.
2. Need return of citation.
3. Request for Action filed 08/23/17

RECOMMENDATION:

Court's discretion

(nb)

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

-----  
DATE: 01/23/18 TIME: 10:00 DEPT: S35P  
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CASE#: PRO PS1401128

CASE NAME: Jewell Nadine McAdams

**SEE ALSO 16**

HEARING:

FIRST & FINAL Account and Report of TRACY FREDRICKSON and  
Petition for allowance of fees filed.

COUNSEL:

D M DAVIS	(TP )...
JEWELL NADINE MCADAMS	(DEC)...
PUBLIC GUARDIAN	(COUNTY COUNSEL
TRACY FREDRICKSON	(PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by TRACY FREDRICKSON is GRANTED  
**TOTAL WAIVED \$465.00**

GENERAL INFORMATION:

Continued from **10/03/16**. The Court suspends administrator's powers and refers matter to the Public Administrator.

Continued from **11/14/16**. Court orders Tracy Fredrickson to appear on 01/10/17.

Continued from **01/10/17**. Citation issued as to: Tracy Fredrickson.

Continued from **03/28/17**. Court re-issues citation for the service to be completed on Tracy Fredrickson of the citation.

**Continued from 06/13/17 and 12/12/17. Citation issued as to Tracy Frederickson.**

THIS CASE IS SET FOR HEARING ON First and Final Account and for Assignment of Case to Public Guardian(s/b Administrator) and Release of Petitioner as Administrator.

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

1. Notice filed 09/02/16 does not include Public Administrator. Need proper service.
2. Accounting period 11/04/13 to 04/23/16.
3. Assets on Hand \$118,000 consisting of real and personal property.
4. Petitioner does not request compensation.
5. Prior Attorney, D.M. Davis does not request compensation.
6. Petitioner alleges delinquent taxes on the Cathedral City real property are due in the amount of \$11,000 which the estate cannot pay. Those taxes will be satisfied if the real property is sold at the tax foreclosure sale on May 19, 2016.

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

Question whether there is surplus on subject property? **Declaration filed 06/13/17 indicates was sold by prior Administrator, Tracy A. Fredrickson. Grand Deed affixed [LF, p. 4]**

7. Petition indicates the real property located in Yucca Valley was bequeathed to Dustin Silus Owens who lived in the property at the time of Decedent's death and continued to reside in the property until the property was no longer habitable. The subject property was in the final stages of foreclosure before petitioner's appointment but the estate had no money with which to bid or reclaim the Navajo Property. Mr. Owens received notice of the Probate and was aware of the foreclosure proceedings and made no effort to assist in saving the property. A Trustee's Deed was recorded on 07/14/15. Question whether there was a surplus on subject property? **Declaration filed 06/13/17 indicates property was sold at Trustee Sale and there were no excess proceeds. Trustee Deed Upon Sale affixed [LF, p.3].**
8. There is a creditor's claim for \$1,638.00 from Diane K. Neugebauer filed on 01/28/15. However, there is no allowance or rejection notice regarding this claim. Need verified supplement confirming status of this claim.
9. Petitioner requests the right of redemption subject to County and State regulations, and surplus monies, if any from the foreclosure of the real property located at 56161 Navajo Trail, Yucca Valley, CA, to decedent's grandson, Dustin Owens.
10. Petitioner requests the right of redemption subject to County and State regulations, and surplus monies, if any from the foreclosure of the real property located at 32570 Monte Vista Road, Cathedral City, CA, to decedent's daughter, Diane Owens, and granddaughter, Tracy Fredrickson, each as to an undivided ½ interest, therein.
11. To Diane Owens, the 2004 Mercury Sable Automobile and all the rest and remainder of decedent's estate.
12. Petitioner indicates she has no funds with which to correct the problems inherent in this estate or to hire an attorney to help her. She cannot post the bond. Petitioner request the Court to relieve her of the responsibility of Administrator and Order the Estate be turned over to the Public Guardian, sic should be Public Administrator, for resolution. JTD.
13. Notice of Non-Payment of Bond filed 07/26/16.
14. Need return of Citation.
15. Notice of Non-Payment of Bond filed 03/14/17.
16. **Declaration Lack of Assets filed by PA on 06/13/17 alleges there are no other known assets and unable to locate prior Administrator, Tracy A. Fredrickson.**

**RECOMMENDATION:**

Need to clear notes then Court's discretion. If approved, set next hearing for receipts and final discharge for **01/29/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 01/23/18 TIME: 10:00 DEPT: S35P  
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CASE#: PRO PS1500680

CASE NAME: Ida Norma Henderson

HEARING:

FIRST AND FINAL Account and Report of S.B. COUNTY PUBLIC  
ADMINISTRATOR and Petition for allowance of fees filed.

COUNSEL:

IDA NORMA HENDERSON (DEC)...  
SB PUBLIC ADMINISTRATOR (PET)...CRAIG M PARKER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees  
by Public Administrator ["Petitioner"].

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

1. Accounting period 01/02/67 to 08/21/17 (50 years-not a typo)
2. Assets on Hand \$23,729.41 in cash.
3. Statutory fees of \$1,225.74 requested. Calculated.
4. Petitioner requests extraordinary fees of \$480 for services rendered in connection with the sale of real property. Billed at \$60/hour for a total of 8 hours' time. Generally described [LF, p. 31]. JTD.
5. Attorney requests extraordinary fees of \$2,625.00 for services rendered in connection with the sale of real property. Billed at \$350/hour for a total of 7.5 hours' attorney time. Itemized [LF, p. 33]. JTD.
6. Petitioner requests authority to withhold the sum of \$2,000 as a reserve. JTD.
7. ~Proposed Order 10/31/17

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for  
**01/29/19.**

(nb)



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 01/23/18      TIME: 10:00      DEPT: S35P  
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CASE#: PRO PS1600429

CASE NAME: MTR OF RICHARD A MILLIGAN

HEARING:

Probate status report filed.

COUNSEL:

JACKIE J JOHNSTON

(PET)...HARTNELL LAW GROUP

RICHARD A MILLIGAN

(DEC)...

S.B CO PUBLIC ADMINISTRATOR

(PET)...CRAIG M PARKER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report.

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 believes there is an additional investment account and is in the process of trying to collect that asset. Petitioner needs additional time to marshal said asset.
2. Petitioner requests an additional 12 months to close the estate.
3. ~Proposed Form Order 09/29/17

RECOMMENDATION:

Courts discretion. If approved, set next hearing for Accounting Review on **08/28/17**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 01/23/18      TIME: 10:00      DEPT: S35P  
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CASE#: SC SS02842

CASE NAME: MTR OF ANDREW JOSHUA BOWLIN

HEARING:

Hearing Re: STATUS OF CASE IN MISSOURI

COUNSEL:

ANDREW JOSHUA BOWLIN

(CEP)...CRAIG M PARKER

KATHY READE

(CPE)...D. HERSHEL W ILSON

**XREF: SCVSS44903** (Andrew Bowlin-v-San Bernardino CO Supt)

No notes – 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 **PROBATE**

-----  
DATE: 01/23/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1500595

CASE NAME: ORENE KNIGHT FAMILY TRUST  
**SEE ALSO 1A, 13**

HEARING:  
Hearing Re: PETITION TO COMPEL ACCOUNTING AND INSTRUCT TRUSTEE

COUNSEL:  
JAMES LOWERY (PET)...ROBERT A KRASNEY  
JULY SPEAR (PET)...PRO/PER  
ORENE KNIGHT FAMILY TRUST (TRU)...  
WILLIAM KNIGHT (MIN)...

GENERAL INFORMATION:

Continued from **08/30/16, 11/08/16 and 01/24/17**. Court orders James Lowery to file an accounting by 3/11/17. Petitioner to submit order.  
Continued from **04/11/17**. Court finds that July Spear and William Knight have standing. Court orders Jim Lowery to file a trust accounting by 05/11/17.  
Citation issued to: Jim Lowery who is cited and required to appear on 06/20/17.  
Continued from **06/20/17**. Court recites Jim Lowery to appear and is ordered to file a trust accounting by 07/29/17. Citation issued to: Jim Lowery who is cited and required to appear on 08/29/17.  
**Continued from 08/29/17 and 12/27/17.**

THIS CASE IS SET FOR HEARING ON Petition to Compel Accounting

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:  
1. Petitioner alleges that William Knight is a beneficiary of the Orene Knight Family Trust dated 1/2/07 and a beneficiary of life insurance policy from William's deceased father, Kurtis Knight (DOD: 10/1/13). Petitioner alleges that all funds are being held in California.  
2. **William was born on 10/18/1997**, which makes him nearly 19 years old. He is no longer a minor. **Question how petitioner has standing under Pr. C. §3919(a). Petition to join petition filed by William Knight on 06/21/16. See next matter.**

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

3. Petitioner alleges that the Orene Knight Trust distributed 30% to Jim Lowery as trustee/custodian for William Knight. Petitioner separately attaches a copy of a proposed distribution letter and a copy of the Trust [6/25/15 Supplement LF p.5, 6].
4. The Trust provides that all funds left to minor, William, be held by Jim Lowery as custodian under the "Texas Uniform Transfer to Minors Act (UTMA)" and distributed upon William attaining age 21. The Trust designates Tami Price as alternate custodian. [6/25/15 Supplement LF p.9]. Although the transfer is made in another state, the transfer falls within the scope of Pr.C. §3902 as the transferring instrument uses the designation under UTMA per Pr.C. §3922(b).
  - a. Petitioner requests the court instruct Mr. Lowery to designate the distributed funds as under UTMA. **Bank statements attached are not clear as to whether the accounts are held by a custodian under UTMA.**
5. Petitioner alleges that Jim Lowry also received proceeds of a life insurance on behalf of minor, William. Petitioner provides a copy of a life insurance policy, but it is unclear if the policy was in effect and/or paid out and who was the designated beneficiary. [6/25/15 Petition LF p.6-16].
6. Petitioner requests the Court compel Jim Lowery to account for the received trust assets and insurance proceeds. Petitioner attaches copies of bank statements, but no accounting is provided (Pr.C. §3912).
7. Petitioner requests the Court determine the reasonableness of the fees taken as petitioner alleges that Jim Lowery has received compensation. However, petitioner does not state the amounts received (Pr.C. §3915).
8. Notice is complete.
9. Proof of served citation filed.
10. No proposed order. Submit Order after Hearing as directed by Court on 01/24/17.

RECOMMENDATION:  
Need Order after Hearing.  
(oc/lc/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: 01/23/18      TIME: 8:30      DEPT: S36P  
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CASE#: PRO PS1500595

CASE NAME: ORENE KNIGHT FAMILY TRUST

**SEE ALSO 1, 13**

HEARING:

FIRST AND FINAL Account and Report of JAMES LOWERY and Petition for allowance of fees filed.

COUNSEL:

JAMES LOWERY	(PET)...ROBERT A KRASNEY
JULY SPEAR	(PET)...PRO/PER
ORENE KNIGHT FAMILY TRUST	(TRU)...
WILLIAM KNIGHT	(MIN)...

GENERAL INFORMATION:

**Continued from 12/27/17. July Spear provides a copy of objection to the First and Final Accounting to Attorney Robert Krasney in open court. Court orders July Spear to serve ALL parties with the objection by 4:00pm tomorrow, December 28, 2017. Court further orders July Spear to file the proof of service by Tuesday, January 2, 2018 with the Court.**

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by James Lowers, custodian of funds

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

1. Accounting period: 07/07/07 to 03/31/17
2. Assets on hand: \$1,463.70
3. Petitioner, James Lowery, was assigned the "custodian" of funds for William Knight, a minor beneficiary of the Orene Knight Family Trust, on or about 04/06/07. Petitioner was appointed by Orene Knight despite the availability of Juli Spear (mother of minor) and became the equivalent of a trustee.
4. On 04/06/07, \$33,070.81 was deposited into Arrowhead Credit Union into two accounts: a savings account of \$30,058.60, and a 12-month CD of \$3,012.21. Later on 09/08/09, \$25,000 from the savings account was transferred to a 60-month CD due to interest rate reduction.

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

5. William reached the age of 18 on 10/18/15 though petitioner continued to act in his capacity as a custodian/trustee under terms of the Trust Restatement [LFpg16, 18].
6. From 12/29/15 to 04/14/17, petitioner made ongoing cash withdrawals given directly to William in order to support William's two children fathered over this time period. There remains a balance of **\$141** in the 60-month CD account, and a balance of **\$1,330.67** in the 12-month CD as of 03/31/17. [LFpg36]
7. Petitioner seeks statutory compensation of **\$1,330.67** for trustee services at 4% of \$33,070.81 per Pr. C. §10800, and as authorized in Trust Restatement [LFpg16], plus reimbursement of \$465.00 for filing fees. JTD.
8. Supplement filed 12/04/17 addresses Juli Spear's question regarding a \$600 withdrawal which she claimed William Knight did not receive. Petitioner alleges Arrowhead Credit Union mistakenly withdrew \$600 from petitioner's personal account which was given to William. On 12/12/15, petitioner discovered the error and Arrowhead Credit Union transferred the funds back to petitioner. See attached Arrowhead Credit Union letter acknowledging error. [Supp 12/04/17, LFpg6].
9. Notice was given.
10. **Objection to First and Final Accounting by Julie Spear filed 12/19/17.**
11. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Matter is contested. If approved, court to set hearing on final discharge for **01/29/19**.  
(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

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DATE: 01/23/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600625

CASE NAME: MTR OF SELMA L ROBERTSON

HEARING:  
Accounting Review

COUNSEL:  
ROSEMARY R MARTIN (PET)...PRO/PER  
SELMA L ROBERTSON (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters Testamentary issued 12/02/16, full authority, \$20,000 bond,.
2. No account 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

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DATE: 01/23/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700160

CASE NAME: MTR OF DEBRA JACKSON SYLVESTER

HEARING:

Petition for AN ORDER TO CONFIRM VALIDITY OF TRUST CONFIRM  
TRUSTEE AND CONFIRM ASSETS TO REVOCABLE TR

COUNSEL:

CALIFORNIA PUBLIC EMPLOYEE'S R	(TP )...CALIFORNIA PUBLIC
DEBRA JACKSON SYLVESTER	(DEC)...
DELONZA SYLVESTER	(PET)...LINDA L MCLARNAN-DUGAN
RHONDA ANTHONY	(PET)...PRO/PER
SBCO PUBLIC ADMINISTRATOR	(SA )...CRAIG M PARKER
WHARLEST I.S. JACKSON	(PET)...JASON L GAUDY

Currently under review by Legal Research.  
(LR)

Notice:

Need Notice of Hearing with proof of service to include beneficiaries Nikita N. Jackson; Rhonda N. Jackson; David Ford; Jeremy Vanison, Cheryl D. Scott; Diedre Townsend; Stella Bland; and Delonza Sylvester.  
(nb)

Future Hearing:  
07/18/18 Accounting Review.

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



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

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DATE: 01/23/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700836

CASE NAME: ROBERT L BROOKS

HEARING:

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

COUNSEL:

GERARD KENDRICK BROOKS (PET)...PRO/PER

ROBERT L BROOKS (DEC)...

#### GENERAL INFORMATION

**Continued from 11/20/17 at request of petitioner to file proof of publication.**

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Gerard Brooks, son

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

1. All heirs waive bond. Net value of the estate consists of \$40,857.00 in real property.
2. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
3. Final Inventory and Appraisal filed 08/18/17; however, real property must be appraised by a probate referee.
4. **Need** proof of publication
5. ~Proposed Form Order: 08/18/17

#### RECOMMENDATION

Need to clear note 4. Court's discretion re bond. If approved, set Accounting/Status Review **04/01/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/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](mailto: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

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DATE: 01/23/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700894

CASE NAME: EUGENE L. SMITH

HEARING:

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

COUNSEL:

BRENNITA B. JACKSON (PET)...PRO/PER  
EUGENE L. SMITH (DEC)..

#### GENERAL INFORMATION

**Continued from 12/04/17. Matter referred to Public Administrator for possible appointment.**

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Brennitta Jackson, fiancé

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

1. All heirs waive bond, however, **need** bond waiver on mandatory judicial council form DE-142/DE-111 (A-3d) by Darion Smith, son . Estate value is currently unknown and will be determined. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. Court to clarify if Cheryl Covington is an ex-wife of decedent as petitioner Brennitta indicates that she was his fiancé.
3. Public Administrator appears to have higher priority per Pr. C. § 8461(p). Court may wish to refer to Public Administrator.
4. As matter may be referred to Public Administrator, court may wish to continue matter to a Tuesday calendar.
5. **Need** proof of publication
6. ~Proposed Form Order: 09/08/17

#### RECOMMENDATION

Need to clear notes 1 & 5 then Court's discretion re note 2 and bond. If approved, set Accounting/Status Review **04/01/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.  
(ww/cs/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](mailto: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

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DATE: 01/23/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700915

CASE NAME: MTR OF SPERRY A MAXWELL

HEARING:

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

COUNSEL:

BEVERLY JEAN MAXWELL (PET)...PRO/PER  
SPERRY A MAXWELL (DEC)...

GENERAL INFORMATION:

**Continued from 12/12/17. The petitioner states the decedent died at San Antonio Community Hospital in Upland California. Kathleen and Cyndi are daughters and Troy is the son. Court clears these probate notes. Matter is continued for proper notice of petition to administer estate with proof of service.**

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by surviving spouse Beverly J. Maxwell ["Petitioner"].

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

1. Petition indicates all heirs waive bond. However, need Mandatory Waiver of Bond by petitioner. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
2. Need Notice of Petition to Administer Estate with proof of service (a mandatory Judicial Council form that contains important language).
3. Proof of publication filed.

RECOMMENDATION:

Need to clear note 2 then Court's discretion re bond. If approved, set future hearing for Accounting on **02/19/19**. 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](mailto: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

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DATE: 01/23/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1701055

CASE NAME: MTR OF EDUARDO PINON GARCIA

HEARING:

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

COUNSEL:

EDUARDO PINON GARCIA (DEC)...  
GABRIEL GUERRERO GARCIA (PET)...DUANE P BOOTH  
GRACIE GUERRERO CASILLAS (PET)...DUANE P BOOTH

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by son and daughter, Gabriel G. Garcia and Gracie G. Casillas ["Petitioners"].

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

1. All heirs waive bond. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
2. Proof of publication filed.
3. ~Proposed Form Order/Letters 10/26/17

RECOMMENDATION:

Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **04/12/19**. 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: 01/23/18      TIME: 8:30      DEPT: S36P  
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CASE#: PRO PS1701265

CASE NAME: MTR OF GARY LEE

HEARING:

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

COUNSEL:

ALITHIA VARGAS-FLORES  
GARY LEE

(PET)...SHEPPARD MULLIN RICHTER &  
(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by named executrix/friend Alithia Vargas-Flores ["Petitioner"].

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

1. 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(b).
2. **Proof of publication filed.**
3. ~Proposed Form Order/Letters 12/12/17

RECOMMENDATION:

Court's discretion. If approved, set future hearing for Accounting/Status Review on **04/12/19**. 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

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DATE: 01/23/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1701276

CASE NAME: ESTATE OF RICHARD BRISCOE

HEARING:

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

COUNSEL:

RICHARD BRISCOE	(DEC)...
TAKISHA BROWN	(PET)...CARMEN QUALLS & ASSOCIATES
YOLANDA BRISCOE	(PET)...CARMEN QUALLS & ASSOCIATES

GENERAL INFORMATION:

Special Letters of Administration issued 12/22/17, \$100,000 bond.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Limited Administration with full authority under IAEA by daughter and sister, Yolanda Briscoe and Takisha Brown ["Petitioners"].

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

1. Petitioner Yolanda Briscoe alleges she is decedent's attorney-in-fact. Does Court wish to require a copy of subject Power of Attorney? JTD.
2. Petitioners request no bond as any assets will be deposited into a blocked account. JTD.
3. Need proof of publication.
4. Need Notice of Petition to Administer Estate with proof of service.
5. ~Proposed Form Order 12/19/17.

RECOMMENDATION:

Need to clear notes then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **04/12/19**. 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](mailto: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

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DATE: 01/23/18 TIME: 8:30 DEPT: S36P  
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CASE#: SPR SS04872

CASE NAME: ESTATE OF LILLIAN E MICHIK

HEARING:

Accounting Review

COUNSEL:

LILLIAN E MICHIK	(DEC)...
RICHARD MICHIK	(PET)...JEFFORD C DAVIS
ROBERT MICHIK	(TP )...SHORE & WURM

GENERAL INFORMATION:

Continued many times since **10/3/11**.

**Continued from 02/01/16** for Counsel to prepare and file a written Status Report and/or Accounting by the end of the month. Court is informed that the estate cannot be closed because counsel has been unable to sell the Salton Sea property which is the only asset remaining. Counsel for the petitioner has contacted the neighbors/adjacent owners to see if they would put the property up for auction or be willing to take the property.

**Continued from 03/30/16, 06/09/16, 08/18/1,11/02/16 and 01/11/17** for a status report to be filed.

*Nothing new filed since 12/6/11.*

Continued from **3/22/17** at request of Counsel for sale of property to close.

**Continued from 08/15/17 and 10/24/17 on court's motion for status of resolution.**

**Counsel report there is a potential buyer.**

THIS CASE IS SET FOR HEARING ON Accounting/Status Review.

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

1. Letters Testamentary issued 08/21/08 to Richard Michik, son, full authority no bond.
2. On 10/28/10, Court deemed the accounting filed on 12/31/07 as a status report.
3. Copy of subpoenaed request filed on 05/09/16. However, it is unclear how the Chief Trial Counsel in Los Angeles is involved. Court to inquire.
4. Status report filed by counsel in the form of a declaration on **12/14/16**. **No fees paid.** Petitioner alleges the property is minimal and no one wants to purchase the 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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

5. Ex parte letter appears to be filed to the Judge on 10/21/16 by Richard Michik.
6. Need notice of hearing and proof of service per Pr. C. § 12201(b) advising the recipients of the right to petition for an account.

**RECOMMENDATION:**

Need notice and fees paid (note 4). If approved, set Accounting/Status Review for **04/04/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/sa/gls/lc/sa/lc/dl/sa/l/lhc/lh/nb)



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HONORABLE: JAMES MICHAEL WELCH

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DATE: 01/23/18 TIME: 8:30 DEPT: S36P  
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CASE#: VPR VS002836

CASE NAME: MATTER OF THE OSBORNE FAMILY TRUST  
**SEE ALSO 11, 12**

HEARING:  
Hearing Re: Citation of Franklin Osborne

COUNSEL:

BRANDI L WEBER	(PET)...EDWARD B FISCHEL &
BRANDI L WEBER	(PET)...PRO/PER
DIANE D HARKISON	(PET)...M DANIEL SAYLOR
FRANKLIN E OSBORNE	(PET)...CALDWELL, KENNEDY & PORTER,
LYNN A SHARP	(APP)...STANLEY W HODGE
LYNN A SHARP	(RES)...STANLEY W HODGE
ORANGE COUNTY DEPARTMENT OF CH	(PRO/PER
THE OSBORNE FAMILY TRUST	(TRU)...

GENERAL INFORMATION:

**Continued from 06/13/17. Attorney Fischel has not been able to get Franklin Osborne served with a citation or notice of the judgment debtor exam. Court will grant a request to continue this hearing and a new order and citation to be submitted. Attorney Edward Fischel to submit order and citation.**

THIS CASE IS SET FOR HEARING ON Citation of Franklin Osbourne

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

1. Matter set at 03/07/17 hearing, wherein, Attorney Edward Fischel was to submit a citation for Franklin Osborne to appear before the court.
2. Need return of citation.

RECOMMENDATION:

Court's discretion  
(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 01/23/18      TIME: 8:30      DEPT: S36P  
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CASE#: VPR VS002836

CASE NAME: MATTER OF THE OSBORNE FAMILY TRUST

**SEE ALSO 10, 12**

HEARING:

ORAP -- Examination of Judgment Debtor

COUNSEL:

BRANDI L WEBER	(PET)...EDWARD B FISCHER &
BRANDI L WEBER	(PET)...PRO/PER
DIANE D HARKISON	(PET)...M DANIEL SAYLOR
FRANKLIN E OSBORNE	(PET)...CALDWELL, KENNEDY & PORTER,
LYNN A SHARP	(APP)...STANLEY W HODGE
LYNN A SHARP	(RES)...STANLEY W HODGE
ORANGE COUNTY DEPARTMENT OF CH	(PRO/PER
THE OSBORNE FAMILY TRUST	(TRU)...

Request for Waiver of Court Fees and Costs filed by BRANDI L WEBER is GRANTED

No notes - ORAP

(nb)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 01/23/18 TIME: 8:30 DEPT: S36P  
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CASE#: VPR VS002836

CASE NAME: MATTER OF THE OSBORNE FAMILY TRUST  
**SEE ALSO 10,11**

HEARING:  
Accounting Review

COUNSEL:

BRANDI L WEBER	(PET)...EDWARD B FISCHER &
BRANDI L WEBER	(PET)...PRO/PER
DIANE D HARKISON	(PET)...M DANIEL SAYLOR
FRANKLIN E OSBORNE	(PET)...CALDWELL, KENNEDY & PORTER,
LYNN A SHARP	(APP)...STANLEY W HODGE
LYNN A SHARP	(RES)...STANLEY W HODGE
ORANGE COUNTY DEPARTMENT OF CH	(PRO/PER
THE OSBORNE FAMILY TRUST	(TRU)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Settling Second and Current Account entered 03/07/17; third account now due.
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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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

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DATE: 01/23/18      TIME: 8:35      DEPT: S36P  
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CASE#: PRO PS1500595

CASE NAME: ORENE KNIGHT FAMILY TRUST

**SEE ALSO 1, 1A**

HEARING:

Petition for Appointment of Probate Referee to Obtain a Forensic Accounting

COUNSEL:

JAMES LOWERY	(PET)...ROBERT A KRASNEY
JULY SPEAR	(PET)...PRO/PER
ORENE KNIGHT FAMILY TRUST	(TRU)...
WILLIAM KNIGHT	(MIN)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Request Appointment of Probate Referee in Order to Obtain a Forensic Accounting and Valuation of Minor's Trust and Life Insurance Proceeds by Julie Spear ["Petitioner"].

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

1. Petitioner indicates she is the parent of William Larry Knight, a beneficiary of 1/3<sup>rd</sup> of the "Living Trust" and sole beneficiary of a fully matured life insurance policy left by Kurtis Knight, his father, who has been deceased since October 2010.
2. Petitioner purports to represent the needs of William to this Court as he under age 21 and is not capable of asserting his rights; deciphering complex accounting; and legal information.
3. Petitioner request appointment of a Probate Referee in order to obtain a forensic accounting and valuation of former minor's trust and life insurance proceeds. Petitioner further requests that the Court make an order that would prevent James Lowery from using William's money to pay for his defense in this matte; restraining him from further use of William's money for self-interests; and that it be determined that the real property presently for sale and the proceeds of the sale of additional real property be held in a constructive trust by James Lowery for William's benefit.
4. Petition is not verified. 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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

5. Need Notice of Hearing with proof of service.
6. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIPS**

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DATE: 01/23/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1400108

CASE NAME: Catherine Tina Meitle

HEARING:

SECOND Account and Report of CYNTHIA ANN MEITLÉ and Petition for allowance of fees filed.

COUNSEL:

CATHERINE TINA MEITLÉ (CEE)...PRO/PER  
CYNTHIA ANN MEITLÉ (PCR)...PRO/PER  
CYNTHIA ANN MEITLÉ (PET)... DAVID PHILIPSON

GENERAL INFORMATION:

Conservatee passed away on 10/11/16.

**Continued from 11/07/17 to clear notes.**

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

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

1. Accounting period 08/06/15 to 10/11/16. However, Summary of Account [LF, p.4] reflects account period of 10/12/16 to 09/20/17. Further, Schedule A [LF, p.5] gives a balance as of 08/06/15. Need verified supplement confirming accounting period which should include pre and post death accounting periods per Pr. C. § 2620.
2. Assets on Hand \$30,208.80 consisting of cash per summary of account {LF, p. 23}. However, Property on hand –Schedule C [LF, p13] reflects amount of \$2,315.99. Need further clarification via verified supplement.
3. Petitioner does not request compensation.
4. Property on Hand at Beginning of Account Period does not reflect ending assets of prior accounting and Total Charges and Total Credits do not match. Need corrected summary of account.
5. Summary of Account [LF, p.23] for the period 08/06/15 to 10/11/16 accounts through 09/19/17.
6. Need distribution clause.
7. Need bank statements per Local Rule 20-908.

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

8. Need residential facility statements and/or written verification of rent per Pr.C. §2620(c)(5).
9. Need Notice of Hearing with proof of service.
10. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

It cannot be determined whether or not this accounting balances. There is insufficient information and known defects that should preclude the Court from approving this accounting period. Need to file proper accounting (Second and Final et seq.) to comply with Pr.C. §1060 et seq. and set on first check calendar **no sooner than 03/06/17.**

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

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DATE: 01/23/18      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS1600104

CASE NAME: IN THE MATTER OF COREY CAPECE

HEARING:

Accounting Review

COUNSEL:

COREY CAPECE

(CTE)...

FRANK CAPECE

(PET)...MELINDA S. BELL

TERRI CAPECE

(PET)...MELINDA S. BELL

GENERAL INFORMATION

**Continued from 09/05/17 and 10/17/17 at request of counsel.**

THIS CASE SET FOR HEARING ON Accounting Review.

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

1. Frank and Terri Capece, (parents) appointed conservators of the estate of Corey Capece on 07/19/16, limited conservatorship, no bond.
2. Need 1<sup>st</sup> Account beginning 07/19/17.

RECOMMENDATION

Inquire status of accounting.

(cs/lh/nb)



Superior Court of Calif, County of San Bernardino

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HONORABLE: JAMES MICHAEL WELCH

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DATE: 01/23/18 TIME: 9:30 DEPT: S36P  
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CASE#: EAP PS1800005

CASE NAME: ONOPA VS. DAVIS

HEARING:

Hearing Re: ELDER OR DEPENDENT ADULT ABUSE

COUNSEL:

KIMBERLY DAVIS (RP)...  
YVONNE D ONOPA (PP)...PRO/PER

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

Need proof of personal service on Kimberly Davis.

(nb)

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

-----  
DATE: 01/23/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1501081

CASE NAME: ALBERT P MENDOZA

HEARING:

FIRST AND FINAL REPORT OF EXECUTOR WITH WAIVER OF Account and Report of CHARLES MENDOZA and Petition for allowance of fees filed.

COUNSEL:

ALBERT P MENDOZA	(DEC)...
AMELIA MENDOZA	(JOHN H. FITZSIMONS
CHARLES MENDOZA	(PET)...C/O SWAN,CARPENTER, WALLIS &
CHARLES MENDOZA	(PET)...J. DAVID HORSPPOOL
IASBEL ALLUM	(OBJ)...JOHN H. FITZSIMONS

**XREF: SPRSS05868** (Albert P Mendoza)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON GENERAL INFORMATION:

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

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

1. Petition alleges an accounting should not be required of this Petitioner as the property bequeathed specifically to Theodore Mendoza has been sold and any accounting would account only for those cash proceed which would be receivable by Theodore Mendoza. Waiver of account filed. However, notwithstanding said waiver, petitioner must file a final report of administration per Pr. C. § 1064 and Pr. C., § 10954(c)(1).
2. Assets on Hand \$191,588.90 consisting of \$180,088.90 in cash and remaining in real property.
3. Statutory compensation of \$7,630.00 requested. Calculated.
4. Petitioner waives extraordinary fees.
5. Attorney requests extraordinary fees of \$36,097.50 for services rendered in connection with probate of a lost will and petition to determine entitlement.

Billed at \$350 to \$395/hour for a 91.50 8 hours' attorney time. Itemized ["LF, pgs. 16-21"]. JTD.

6. Theodore Mendoza has signed an instruction, filed on 09/27/17, wherein he is instructing the Executor of the Estate to distribute the proceeds of the sale of the West Sharon property, net costs of administration, to the surviving issue of the Decedent, by right of representation and for the California City lot to be distributed to him. Petitioner is requesting this Court authorize such distribution.
  - a. It appears Theodore Mendoza is assigning the proceeds from the sale of real property specifically bequeathed to him, in favor of decedents' issue and title to the California City property. Suggest Court require proper assignment(s). JTD.
  - b. Question whether remaining beneficiaries approve of this proposed distribution? Need subject agreement.
7. Petitioner requests authority to withhold the amount of \$2,000 as a reserve.
8. Proposed Order 09/27/17 does not include address of beneficiary receiving real property.

#### RECOMMENDATION

Need to clear notes 6a & 6b then Court's discretion. If approved, set next hearing for receipts and final discharge for **01/29/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 01/23/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601029

CASE NAME: MTR OF KAREN LYNN HALL

HEARING:

FIRST AND FINAL Account and Report of KEENAN MICHAEL HALL and  
Petition for allowance of fees filed.

COUNSEL:

KAREN LYNN HALL (DEC)...  
KEENAN MICHAEL HALL (PET)...DUANE P BOOTH

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees  
by Executor, Keenan M. Hall ["Petitioner"].

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

1. Accounting period 09/18/16 to 07/31/17.
2. Assets on Hand **\$698,249.33 of which \$24,604.33 in cash and remaining in real and personal property.**
3. Current bond of \$20,000.
4. Petitioner waives statutory compensation.
5. Attorney requests statutory fees of \$17,344.99. Calculated.
6. Need legal description of property and APN # per Local Rule 20-610.
7. **Petition includes an Allstate Policy, Schools First Credit Union Account, all paychecks, STRS proceeds/contributions, all retirement and Social Security benefits in decedent's name that were not included on the I & A's. Need further clarification via verified supplement.**
8. **Notice filed on 10/05/17 does not include creditors Ascension Point Recovery Services, LLC or Springcastle Finance Funding Trust. Need proper service.**
9. Petitioner requests authority to withhold \$5,000 as a reserve. JTD.
10. Proposed Order 01/12/18 reflects a balance that differs from amount in supplemental filed 01/12/15; does not include description of the assets on hand; need address of beneficiary receiving real property; no omnibus clause;

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

**RECOMMENDATION:**

Need to clear note 6-8 then Court's discretion. If approved, set next hearing for final discharge for **01/29/19**.

(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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

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HONORABLE: TARA REILLY

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DATE: 01/23/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601249

CASE NAME: MTR OF DEE SHCNEPF-EWING

**SEE ALSO 4**

HEARING:

Hearing Re: PETITION FOR SPECIFIC PERFORMANCE OR CONTRACT

COUNSEL:

ABRAHAM TEKIN	(CC )...THOMPSON & COLEGATE
ANGELA LANDIN	(PET)...DIANA J CARLONI
BO RAMOS	(MIN)...PRO/PER
DEE SHCNEPF-EWING	(DEC)...
OZEL DEVELOPERS, INC	(PET)...THOMPSON & COLEGATE
SURETEC INSURANCE COMPANY(TP )...	

Currently under review by Legal Research.  
(LR)

Future Hearing:  
07/19/18 Accounting Review.

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

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HONORABLE: TARA REILLY

-----  
DATE: 01/23/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601249

CASE NAME: MTR OF DEE SHCNEPF-EWING

**SEE ALSO 3**

HEARING:

Hearing Re: PET FOR DECLARATORY RELIEF OR BREACH OF CONTRACT

COUNSEL:

ABRAHAM TEKIN	(CC )...THOMPSON & COLEGATE
ANGELA LANDIN	(PET)...DIANA J CARLONI
BO RAMOS	(MIN)...PRO/PER
DEE SHCNEPF-EWING	(DEC)...
OZEL DEVELOPERS, INC	(PET)...THOMPSON & COLEGATE
SURETEC INSURANCE COMPANY(TP )...	

Currently under review by Legal Research.  
(LR)

Future Hearing:  
07/19/18 Accounting Review.

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

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 01/23/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1700959

CASE NAME: MTR OF DONALD LEE BRAWLEY

HEARING:

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

COUNSEL:

DONALD LEE BRAWLEY

(DEC)...

TAMALA JANSEN

(PET)...TREVOR

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by named executrix and daughter, Tamala Jansen ["Petitioner"].

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

1. 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(b).
2. Proof of publication filed.
3. ~Proposed Form Order/Letters 09/27/17.

RECOMMENDATION:

Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **04/12/19**. 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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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 01/23/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1701218

CASE NAME: MTR OF AUDREY THERESA STRANSKY

HEARING:

Petition to Determine Succession to Real Property

COUNSEL:

AUDREY THERESA STRANSKY      (DEC)...

JOEL STRANSKY      (PET)...ELDER LAW SERVICES OF

GENERAL INFORMATION:

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

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

1. Petitioner requests a determination that decedent's real property located in San Bernardino County pass to petitioner without administration. Petitioner is decedent's issue and purported only heir.
2. ~Proposed Form Order 11/30/17.

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: 01/23/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1701219

CASE NAME: ESTATE OF JOHN ROBERT TURNER

HEARING:

Spousal Property Petition hearing.

COUNSEL:

JOHN ROBERT TURNER (DEC)...  
PATRICIA L TURNER (PET)...IGNAZIO FICARA

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Patricia L. Turner ["Petitioner"].

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

1. Petitioner requests determination of property passing to the surviving spouse as community property. Specifically, real property in San Bernardino County. Petitioner indicates parties married on 04/28/95 and treated the property as community property as all mortgage, maintenance and improvements were paid for with community property funds.
2. Petitioner alleges that on several occasions, the Decedent expressed a desire to transfer title to himself and to the Petitioner but through a combination of procrastination, inadvertence and ultimately illness, this was never done.
3. Decedent died intestate with 2 issues who would also share a two-thirds distribution in the estate per Pr.C. §6401 if the real and personal property is separate property of decedent.
4. Petitioner also requests both vehicles to be confirmed to petitioner, herein.
5. ~Proposed Form Order 11/27/17.

RECOMMENDATION:

Court's discretion

(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](mailto: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

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DATE: 01/23/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700828

CASE NAME: FRANCISCO A OLIVA

HEARING:  
Hearing Re: RECEIPT OF BOND

COUNSEL:  
FRANCISCO A OLIVA (DEC)...  
REBECCA OLIVA-RAMIREZ (PET)...LARWILL & WOLFE Future Hearing:

**VACATE** – corrected bond filed.  
(nb)

Future Hearing:  
01/28/19 Accounting Review

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

## TRUSTS AND MOTIONS

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DATE: 01/23/18      TIME: 8:35      DEPT: S37P  
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CASE#: PRO PS1700490

CASE NAME: MTR OF 2010 MOSER FAMILY TRUST

### **SEE ALSO 9**

HEARING:

Petition for (VERIFIED) TO INVALIDATE PUERPORTED FIRST AMENDMENT  
VASED ON UNDUE INFLUENCE ETC

COUNSEL:

2010 MOSER FAMILY TRUST	(TRU)...
ETHEN BOYD MOSER	(PET)...BETTY AUTON-BECK
PATRICIA SIMPSON	(OBJ)...FELIX M MARTIN

Currently under review by Legal Research.  
(LR)

Notice given.  
(nb)

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DATE: 01/23/18      TIME: 8:35      DEPT: S37P  
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CASE#: PRO PS1700490

CASE NAME: MTR OF 2010 MOSER FAMILY TRUST

**SEE ALSO 8**

HEARING:

Trial Setting Conference

COUNSEL:

2010 MOSER FAMILY TRUST

(TRU)...

ETHEN BOYD MOSER

(PET)...BETTY AUTON-BECK

PATRICIA SIMPSON

(OBJ)...FELIX M MARTIN

No notes – TSC.

(nb)





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PROBATE/CONSERVATORSHIP CALENDAR

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**CONSRVATOSHIPS**

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DATE: 01/23/18      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS0700070

CASE NAME: ABRAHAM ISAAC ARRIOLA

HEARING:

Hearing Re: POSS REMOVAL OF CO-CONSERVATOR

COUNSEL:

ABRAHAM ISAAC ARRIOLA	(CEE)...JEANNE E KENNEDY
FAITH MICHELLE ARRIOLA	(CP )...PRO/PER
RAMONA D MASHTALIER	(CP )...JANET M HERRING
WILLIAM B MASTALIER	(CP )...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Possible Removal of Co-Conservator

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

1. Matter set at 12/08/17 hearing, wherein, The Court having reviewed the Court Investigator report filed 11/22/17 orders counsel to be appointed and matter placed on calendar on the issue of the possible removal of co-conservator, William Mastalier.
2. Attorney Jeanne E. Kennedy appointed. **Report filed.**
3. Notice by Judicial Assistant.

RECOMMENDATION:

Court's discretion

(nb)



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DATE: 01/23/18      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1600067

CASE NAME: MTR OF ROSARIO BERNAL RADOS

**SEE ALSO 14**

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of ALEXANDER ORONOZ

COUNSEL:

ALEXANDER ORONOZ                      (CPE)...JACK B. OSBORN  
ROSARIO BERNAL RADOS                (CEP)...DONNASUE ORTIZ

GENERAL INFORMATION

Continued from **12/14/16**.

Continued from **01/17/17**. Matter trailing other hearing set.

Continued from **03/21/17** at request of counsel. Attempting settlement.

Continued from **06/20/17**. Matter continued to trial other hearings set.

**Continued from 10/17/17 and 11/21/17 at request of counsel. Counsel indicates parties are waiting for final inventory and appraisal.**

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Alexander Oronos, son appointed conservator of the person and estate on 05/18/16, \$200,000 bond.
2. Notification of Conservatee's Rights per Pr.C.§1830(c) filed 12/07/16.
3. Determination of Conservatee's Appropriate Level of Care filed 12/7/16.
4. Care Plan in accord with Pr.C.§2352 filed 12/7/16.
5. Need final Inventory & Appraisal per Pr.C.§2610.
6. Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
7. Proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313 filed 06/01/16.

RECOMMENDATION

Inquire status. When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. § 2614.5 and/or 8505. (lc/lh/nb/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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

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DATE: 01/23/18      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1600067

CASE NAME: MTR OF ROSARIO BERNAL RADOS

**SEE ALSO 13**

HEARING:

Accounting Review

COUNSEL:

ALEXANDER ORONoz                      (CPE)...JACK B. OSBORN  
ROSARIO BERNAL RADOS              (CEP)...DONNASUE ORTIZ

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

- 1      Order appointing conservator of the person and estate, Alexander Oronoz, entered 05/18/16, \$200,000 bond.
- 2      Need final Inventory & Appraisal per Pr.C.§2610.
- 3      No accounting or waiver of account. Need same.

RECOMMENDATION:

Inquire status.

(nb)

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DATE: 01/23/18      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1700380

CASE NAME: GARY HOUGHTON

**SEE ALSO 15A**

HEARING:

Hearing Re: APPROVAL OF SALE OF REAL PROPERTY

COUNSEL:

GARY HOUGHTON	(CTE)...PRO/PER
THOMAS N JACOBSON	(CE )...THOMAS N. JACOBSON
THOMAS N JACOBSON	(PET)...THOMAS N. JACOBSON

GENERAL INFORMATION:

Ex Parte Orders granted 10/30/17.

THIS CASE IS SET FOR HEARING ON Approval of Sale of Great Britain Real Property by Temporary Conservator of the Estate, Thomas Jacobson ["Petitioner"].

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

1. Matter set at 10/30/17 hearing, wherein, the Court directed it be notified when Great Britain court receives funds post sale.
2. Counsel reported potential buyer is living in the home on a lease agreement pending sale.
3. Court appointed Donnasue Oritz as GAL. Need report by same.
4. Need general appointment documentation to be filed per Pr. C. § 2250(a).
5. Notice by Judicial Assistant.

RECOMMENDATION:

Need report by GAL and general appointment documentation.

(nb)

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-----  
DATE: 01/23/18      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1700380

CASE NAME: GARY HOUGHTON

**SEE ALSO 15**

HEARING:

Hearing Re: REPORT OF SALE AND PETITION FOR ORDER CONFIRMING  
SALE OF REAL PROPERTY

COUNSEL:

GARY HOUGHTON

(CTE)...PRO/PER

THOMAS N JACOBSON

(CE )...THOMAS N. JACOBSON

THOMAS N JACOBSON

(PET)...THOMAS N. JACOBSON

Address: 12740 Sandburg Way, Grand Terrace, CA 92313

Appraised Value: \$372,000.00

Sale price: \$380,000.00

First overbid: \$399,500.00

Deposit: **\$20,000 – insufficient. Deposit must be 10% of the purchase prices unless the sale is VA or FHA financed.**

Commission: 6% = \$22,800.00

Additional bond: **Current bond of \$330,000 – Insufficient. Suggest bond of \$418,000.00 (includes recovery). JTD.**

Reason for Sale: The sale is to the advantage of the estate and in the best interest of the interested persons.

Exposure to Market: Listed with Ken Scott Real Estate.

Notice: Given; published and posted.

~Proposed Form Order 12/22/17

(nb)

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
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DATE: 01/23/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700429

CASE NAME: MTR OF ZACHARY DUDECK

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
STEPHANIE DUDECK (CPE)...SOHEILA S AZIZI & ASSOCIATES P  
ZACHARY DUDECK (CEP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person and estate, by mother, Stephanie Dudeck ["Petitioner"].

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

1. Petitioner requests bond not be required as Conservatee's assets are less than \$1,000 and his monthly income does not exceed \$750. It appears income consists of public entitlements. If so, question need for estate powers? JTD.
2. Section 1 [LF, p. 2] does not specify orders or powers requested. Need verified supplement.
3. Proposed conservatee is developmentally disabled. Need appointment of counsel and report by same.
4. Medical Capacity Declaration filed.
5. Petitioners request Pr. C. §§ 2351.5 – 2474 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, give or withhold consent to all medical decisions for the proposed limited conservatee.
6. Petitioner requests to limit civil and legal rights of proposed conservatee to consent or withhold consent to marriage of, or entrance into a registered domestic partnership by limited conservatorship; to exercise limited

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

conservatee's right to control his or her social and sexual contacts and relationships.

7. List of Required Contacts does not include petitioner. Need same.
8. **Citation returned served.**
9. Need Court Investigator Report.
10. Need Inland Regional Center Report.
11. **Certificate of Completion re Conservatorship Class filed.**
12. ~Proposed Form Order/Letters 11/21/17 & 01/08/18

RECOMMENDATION:

Court to appoint counsel then need to clear notes. If approved, set hearing for Compliance Review for **08/28/17** 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.

Set Accounting Review hearing for **04/12/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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CASE#: CON PS1700447

CASE NAME: MTR OF ALEXANDER SALDIVAR

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ALEXANDER SALDIVAR	(CTP)...
JESUS SALDIVAR	(CP )...PRO/PER
MARIA S SALDIVAR	(CP )...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by parents, Jesus and Maria S. Salvidar ["Petitioners"].

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

1. Minor will reach majority on 02/28/18.
2. No bond – person only.
3. Proposed conservatee is developmentally disabled. Need appointment of counsel and report by same.
4. Medical Capacity Declaration filed.
5. 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.
6. Petitioner requests to limit civil and legal rights of proposed conservatee to consent or withhold consent to marriage of, or entrance into a registered domestic partnership by limited conservatorship; to exercise limited conservatee's right to control his or her social and sexual contacts and relationships.
7. Citation returned SERVED.
8. Court Investigator Report filed.

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

9. Need Inland Regional Center Report.
10. Need Certificates of Completion re Conservatorship Class.
11. ~Proposed Form Order 12/08/17.

**RECOMMENDATION:**

Court to appoint counsel then need to clear notes. If approved, set hearing for Compliance Review for **08/28/18** 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)



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DATE: 01/23/18 TIME: 9:30 DEPT: S37P  
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CASE#: VC VS00477

CASE NAME: MATTER OF JEFFREY BRANDON FORKER

HEARING:

Hearing Re: REVIEW OF CONSERVATORSHIP

COUNSEL:

DOUGLAS FORKER	(OBJ)...PRO/PER
JEFFREY BRANDON FORKER	(CEP)...ROSE C ROSADO
VALERIE ELIZABETH FORKER	(CPE)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Review of Conservatorship

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

1. Matter set at 12/08/17 hearing, wherein, the Court having reviewed the Court Investigator report filed 11/28/17 orders counsel to be appointed and matter placed on calendar to discuss the issue of unsanitary conditions in the home.
2. Attorney Rose C. Rosado appointed. Need report by same.
3. Notice by Judicial Assistant.

RECOMMENDATION:

Need report then Court's discretion  
(nb)

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DATE: 01/23/18      TIME: 9:30      DEPT: S37P  
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CASE#: VG VS69

CASE NAME: IN THE MATTER OF GARY EDWARD BRAUN

HEARING:

Hearing Re: NEED FOR SUCCESSOR CONSERVATOR

COUNSEL:

GARY EDWARD BRAUN                      (PCE)...SHERRI L KASTILAHN  
MARJORIE CARDOZA                      (CPE)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Review of Conservatorship

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

1. Matter set at 12/08/17 hearing, wherein, the Court having reviewed the Court Investigator report filed 11/29/17 orders counsel to be appointed and matter placed on calendar to discuss the issue of the need for a successor conservator.
2. Attorney Sherri L. Kastilahn appointed. Need report by same.
3. Notice by Judicial Assistant.

RECOMMENDATION:

Need report then Court's discretion

(nb)