



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 01/24/18

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.

01/03/18lh; 01/19/18lh

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District - Civil

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **ELDER ABUSE**

DATE: 01/24/18 TIME: 8:30 DEPT: S35P

CASE#: CIP DS1700104

CASE NAME: IN RE: ESTATE OF ANGELA LIZETTE ALBA

SEE ALSO 2 3 4

HEARING:

Order to show cause re: verification of deposit

COUNSEL:

JEFFREY G. PRENTICE (PET)...LAW OFFICE OF PETER R NASMYTH
ISSABELLA PRENTICE (M/P)...LAW OFFICE OF PETER R NASMYTH
ANNELISE PRENTICE (M/P)...LAW OFFICE OF PETER R NASMYTH
KATHERINE PRENTICE (M/P)...LAW OFFICE OF PETER R NASMYTH

XREF: PROPS1500171 *ANGELA LIZETTE ALBA*

GENERAL INFORMATION

Continued from 09/06/17. No appearance. Court sets OSC re surcharge of \$5,000.00 each on Jeffrey Prentice and Issabella Prentice payable to the estate for failure to appear/file.

On 09/21/17, Court vacated OSC re surcharge of \$5,000.00 hearing per 09/21/17 minutes of PROPS1500171.

Continued from 11/01/17 at request of Counsel. Later, after matter was called, Court directed Judicial Assistant to contact Counsel to determine counsel's availability for a Wednesday hearing, as the originally given date was a Thursday. Judicial Assistant contacted Counsel and date of 01/24/18 was chosen.

THIS CASE IS SET FOR HEARING ON OSC re Verification of Deposit

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

1. Matter set on 08/03/17, wherein, Court granted settlement of \$9,333.33 ordered deposited in a trust account with no funds to be withdrawn without court approval.
2. Court to see Declaration of Peter Nasmyth re: failure to appear at OSC hearing filed 09/19/17.
3. **Need** proof of deposit.

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

RECOMMENDATION

Inquire status.

(lh/ww/lh)

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

DATE: 01/24/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500171

CASE NAME: ANGELA LIZETTE ALBA

SEE ALSO 1 3 4

HEARING:

Hearing Re: Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

ANGELA LIZETTE ALBA	(DEC)...
GOOD DEEDS, INC.	(PET)...JEFFREY A COLEMAN
KATHERINE PRENTICE	(MIN)...PETER R NASMYTH JR
ANNELISE PRENTICE	(MIN)...PETER R NASMYTH JR
ISABELLA PRENTICE	(MIN)...PETER R NASMYTH JR
JEFFREY PRENTICE	(PET/OBJ)...PETER R NASMYTH JR
CHRISTINA ERICKSON-TAUBE	(SPA)...BORDEN LAW OFFICE

XREF: CIPDS1700104 *IN RE: ESTATE OF ANGELA LIZETTE AL*

GENERAL INFORMATION

Continued from **4/9/15** and **6/26/15** Bradley Damron appointed Special Administrator.
Continued from **7/30/15**, **9/17/15** and **10/29/15** for parties to meet and confer. Jeffrey
Prentice appointed GAL for Katherine Prentice.

Continued from **1/20/16**, **03/16/16**, **05/18/17**, **07/20/17** and **09/21/17**.

**Continued from 11/01/17 at request of Counsel. Court reset hearing from
01/29/18 to 01/24/18.**

THIS CASE SET FOR HEARING ON

- Petition 1 - Petition for Probate, Letters Testamentary with Full Authority under IAEA by Bradley Damron (fiancé)
- Petition 2 – Petition for Letters of Administration with full authority under IAEA by Jeffery Prentice (former spouse)

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

Petitioner 1 – Bradley Damron, fiancé.

- 1 Will waives bond. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(c).
- 2 Decedent left 3 minors age 13 and under.

- 3 **Objection and will contest filed on 03/25/15 by Jeffrey Prentice, former spouse. Need summons issued and set for hearing Pr.C. § 8250.**
- 4 **Answer to will contest filed by Good Deeds Inc. on 04/13/16.**
- 5 ~Proposed Form Order: 02/23/15.

Petitioner 2 – Jeffrey Prentice, former spouse.

1. Petitioner is seeking bond of \$296,000.
2. Decedent left 3 minors age 13 and under.
3. ~Proposed Form Order: 05/18/15.

RECOMMENDATION

Need summons. Matter is contested; petitioner 1 appears to have higher priority. If approved, need determination re bond and set hearing for Accounting/Status Review on **04/03/19**. Any accounting to be filed at least 30 days in advance. Note Local Rule requirements.

(lc/sa/lc/cs/ww/lh)

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

DATE: 01/24/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500171

CASE NAME: ANGELA LIZETTE ALBA

SEE ALSO 1 2 4

HEARING:

Hearing Re: STATUS OF SETTLEMENT

COUNSEL:

ANGELA LIZETTE ALBA	(DEC)...
GOOD DEEDS, INC.	(PET)...JEFFREY A COLEMAN
KATHERINE PRENTICE	(MIN)...PETER R NASMYTH JR
ANNELISE PRENTICE	(MIN)...PETER R NASMYTH JR
ISABELLA PRENTICE	(MIN)...PETER R NASMYTH JR
JEFFREY PRENTICE	(PET/OBJ)...PETER R NASMYTH JR
CHRISTINA ERICKSON-TAUBE	(SPA)...BORDEN LAW OFFICE

XREF: CIPDS1700104 *IN RE: ESTATE OF ANGELA LIZETTE AL*

GENERAL INFORMATION:

Continued from 09/21/17. Court vacates OSC re surcharge.

Continued from 11/01/17. Off-Calendar. Petition re status of settlement filed

THIS CASE IS SET FOR HEARING ON Status of Settlement.

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

1. Matter set on 05/18/17 competing matter for petition for administration/probate.

RECOMMENDATION:

Inquire status of settlement.

(lc/ww/lh)

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

DATE: 01/24/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500171

CASE NAME: ANGELA LIZETTE ALBA

SEE ALSO 1 2 3

HEARING:

Hearing Re: PETITION TO APPROVE SETTLEMENT

COUNSEL:

ANGELA LIZETTE ALBA	(DEC)...
GOOD DEEDS, INC.	(PET)...JEFFREY A COLEMAN
KATHERINE PRENTICE	(MIN)...PETER R NASMYTH JR
ANNELISE PRENTICE	(MIN)...PETER R NASMYTH JR
ISABELLA PRENTICE	(MIN)...PETER R NASMYTH JR
JEFFREY PRENTICE	(PET/OBJ)...PETER R NASMYTH JR
CHRISTINA ERICKSON-TAUBE	(SPA)...BORDEN LAW OFFICE

XREF: CIPDS1700104 *IN RE: ESTATE OF ANGELA LIZETTE AL*

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition to Approve Settlement of Will Contest by Good Deeds, Inc

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

1. Petitioner, Good Deed, Inc, is the assignee of record of the sole beneficiary, Bradley Ethan Damron. Respondent, Jeffrey Prentice, is the guardian ad litem of Decedent's three minor children: Annelise Prentice, Issabella Prentice, Katherine Prentice, and Jeffrey Prentice, who filed a contest of will alleging the will was invalid.
2. Petitioner, Good Deeds, Inc, seeks approval of settlement of a will contest previously approved on 08/03/17 by Court via Order Approving Compromise of Pending Action [Petition, 10/10/17, LFpgs20-42]. JTD
3. Petitioner is to receive 60% of the net assets of the estate, and respondent is to receive the remaining 40% of the net assets upon approval of final account and request for distribution.

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

4. Respondent, Jeffrey Prentice, in his individual capacity, had a judgment lien against real property and will receive \$10,216.68 from the personal representative. JTD
5. Cash held by petitioner's counsel, and not by the personal representative, will be released to the lender who lent the estate representative money. Question who the name of the lender due funds? **Need** verified supplement.
6. Notice of Hearing and proof of service filed 10/10/17 contains incorrect hearing date of 11/01/17. **Need Notice of Hearing with proper hearing date and proof of service.**
7. Proposed Order filed 10/10/17 contains incorrect hearing date. Proposed order provides for petitioner to release funds to an unspecified lender. Orders must be complete within themselves per Local Rule 20-614.

RECOMMENDATION

Need to clear notes 5-6, then Court's discretion.

(lh)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 01/24/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500651

CASE NAME: MTR OF DANIELLE TSCHAN RICHARDSON

SEE ALSO 6

HEARING:

Hearing Re: SPOUSAL PROPERTY PETITION

COUNSEL:

CHRISTOPHER GAGE RICHARDSON (PET)...MITCHELL I ROTH
DANIELLE TCHAN RICHARDSON (DEC)...
GAVIN REED WHITLEY (MIN)...MARK J. FLORY
GAGE KEATON RICHARDSON (MIN)...MARK J. FLORY
GRANT CHRISTOPHER RICHARDSON (MIN)...MARK J. FLORY
STATE OF CALIFORNIA FRANCHISE TAX BOARD (AGN)...

XREF: FAMSS1407215 (*Christopher G Richardson –N- Danielle T Richardson*)

GENERAL INFORMATION

Continued from **9/17/15** to file objections. Mark Flory appointed GAL for three minors.
Continued from **11/19/15** Counsel reports that petitioner has no objection to the three minors having an equal distribution.

Continued from **01/27/16, 03/29/16 and 05/12/16**. Settlement reached needs to be signed.

Continued from **07/21/16** at request of all parties for settlement to be finalized and signed.

Continued from 11/22/16 and 03/07/17.

OSC set on 03/07/17 when matter was referred to mediation.

On 06/21/17 Procedural requirements to be completed pending next hearing; parties agreed.

Continued from **07/26/17**. OSC dismissed as to dismissal.

Continued from 10/25/17 Court indicates that the tentative is to authorize the settlement reached by parties. Continued at request of Counsel due to oral objection by Bryan Hartnell.

THIS CASE SET FOR HEARING ON **OSC re Settlement/Spousal Property Petition**

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

1. Petitioner, Christopher Richardson, is seeking court confirm his half of the community property and determine decedent's half of community property, person and real, pass to petitioner.
2. Petitioner and decedent were in dissolution proceedings at the time of decedent Danielle Richardson's death. Petitioner does not set forth how the property was purchased, when decedent and petitioner were married or evidence that decedent's property should pass to petitioner when the will specifically intended to leave petitioner nothing [LFpg5]. Court to see sticky note on page 1 of petition. **Need** verified supplement with points and authorities.
3. Decedent left two minor issues. **Need** report of GAL Mark Flory.
4. **Need** settlement.
5. **Amended** Creditor's claim filed **08/29/16** by FTB in the amount of **\$7,729.45**.

RECOMMENDATION

Court's discretion re OSC. Need to clear notes 2-4.

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

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 01/24/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500651

CASE NAME: MTR OF DANIELLE TSCHAN RICHARDSON

SEE ALSO 5

HEARING:

Hearing Re: OSC RE SETTLEMENT

COUNSEL:

CHRISTOPHER GAGE RICHARDSON (PET)...MITCHELL I ROTH

DANIELLE TCHAN RICHARDSON (DEC)...

GAVIN REED WHITLEY (MIN)...MARK J. FLORY

GAGE KEATON RICHARDSON (MIN)...MARK J. FLORY

GRANT CHRISTOPHER RICHARDSON (MIN)...MARK J. FLORY

STATE OF CALIFORNIA FRANCHISE TAX BOARD (AGN)...

See notes on prior matter #5.

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 01/24/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600193

CASE NAME: MARILYN DOSKOCIL

HEARING:

Hearing Re: STATUS CONFERENCE

COUNSEL:

NORMAN GIEBELER

(PET)...LAW & STEIN

MARILYN DOSKOCIL

(DEC)...

AUCTION-CA FINANCIAL SRVS

(TP)...

Status—no notes—JTD

Future Hearings: 2/21/18 Readiness Calendar, Petition for Letters of Administration
3/19/18-3/23/18: Court Trial

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

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 01/24/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600481

CASE NAME: MTR OF DORA G GREENE

HEARING:

FIRST AND FINAL Account and Report of KARL SMITH and Petition
for allowance of fees filed.

COUNSEL:

KARL SMITH (PET)...CARLA D ALLEN
DORA G GREENE (DEC)...

Waiver of Court Fees and Costs filed by KARL SMITH is GRANTED
TOTAL FEES WAIVED TO DATE: \$955.50

GENERAL INFORMATION:

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

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

1. Assets on hand: \$7,190.00, cash
2. Administrator and Attorney request statutory fees in the reduced amount
of \$3,595, each. Calculated.
3. **Need** bank/investment statements verifying date of death balances and
final ending balance per Local Rule 20-908. *Supp filed 01/18/18 indicates
petitioner is in possession of the funds received from short sale of real
property; however, he does not have a bank statement showing balance.*
**Question if funds were invested in an interest bearing account as
alleged in paragraph 11(5) of accounting? If so, need letter from
bank verifying balance on hand, if statement is unavailable per Local
Rule 20-908.**
4. Request for special notice by Theresa Palmer filed 09/08/16.
5. Notice was given.
6. No proposed order submitted. Submit after hearing.

RECOMMENDATION:

Need to clear note 3, then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **01/30/19**.

(lh)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 01/24/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600531

CASE NAME: FLOSSIE JENKINS HARDY

SEE ALSO 10

HEARING:

Petition for APPROVAL OF SETTLEMENT; APPROVAL OF AGREEMENT
CONCERNING ATTORNEY'S FEES

COUNSEL:

LINDA S SIMPSON (PET)...ELIZABETH T PIERSON
FLOSSIE JENKINS HARDY (DEC)...

GENERAL INFORMATION

Continued from 12/13/17 by Court. Counsel is to file a confidential supplement containing the settlement agreement by the next hearing date. Notice to be given by Attorney Elizabeth Pierson.

THIS CASE IS SET FOR HEARING ON Petition for Approval of Settlement and for Approval of Attorney's Fee Agreement by Linda Simpson

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

1. Petitioner Linda Simpson was appointed Administrator of the Estate of Flossie Hardy, Letters issued 08/19/16 with full authority.
2. Petitioner is informed and believes decedent's death was wrongfully caused by Pradaxa, a medication prescribed to decedent.
3. Petitioner has negotiated a settlement agreement against the pharmaceutical manufacturer arising out of the wrongful death claim in the amount of \$417,000, without filing suit.
4. Petitioner requests Court to blindly approve settlement, alleging it is in the best interest of the estate. Petitioner alleges a term of the Settlement Agreement is that its terms are confidential, which prevent petitioner from submitting it to Court for review. **JTD**
5. Petitioner seeks approval of the contingent fee agreement with The Gallagher Law Firm, a personal injury firm specializing in complex litigation, in which they will front all costs of litigation in return for 33% of recovery. Fee Agreement attached [Petition, 09/05/17, LFpg7-8]. **JTD**
6. **Need confidential verified supplement with attached settlement agreement.**

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

7. Proposed Order submitted 12/05/17 is incomplete as it does not self forth matters passed by Court, names of parties affected, amount of money affected, and its effect cannot be determined without reference to petition. **Need revised order in compliance with Local Rule 20-614(b) to be submitted after hearing.**

RECOMMENDATION

Need to clear note #6, then Court's discretion.

(lh)

Future Hearing: 1/24/18: Probate Status Report

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 01/24/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600531

CASE NAME: FLOSSIE JENKINS HARDY

SEE ALSO 9

HEARING:

Probate status report filed.

COUNSEL:

LINDA S SIMPSON (PET)...ELIZABETH T PIERSON
FLOSSIE JENKINS HARDY (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report of Administration

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

1. Letters of Administration issued to Linda Simpson on 08/19/16.
2. Petitioner alleges the estate is not in a condition to be closed as the sole asset of the estate is a wrongful death claim from a pharmaceutical company pending settlement. The settlement has not been marshalled. See notes on prior matter.
3. Petitioner requests an additional 9 months to close the estate.
4. **Need** Notice of Hearing and proof of service in accord with Pr.C. § 12201. Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. § 10950. **This form of notice is mandatory.**

RECOMMENDATION:

Require notice then Court's discretion. If approved, set next hearing for Accounting Review on **07/11/18**.

(lh)

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

DATE: 01/24/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700252

CASE NAME: CARMELITA HELM

HEARING:

WAIVER OF AND FINAL Account and Report of TRICIA C DEBAUN and
Petition for allowance of fees filed.

COUNSEL:

TRICIA C DEBAUN (PET)...CALDWELL, KENNEDY & PORTER, A.
CARMELITA HELM (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of 1st Account Current and Petition for
Final Distribution and Request for Attorney Fees, by Tricia C Debaun, executor/sole
beneficiary

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

1. Petitioner is the sole heir/beneficiary and waives account.
2. Assets on hand \$60,759.92, held in attorney-client trust account.
3. Petitioner waives statutory compensation.
4. Attorney requests statutory compensation of \$7,795.00. Calculated.
5. Attorney requests extraordinary compensation of \$1,200 for 6.2 hours at
\$300/\$150 per hour regarding sale of real property. Itemized. [LFpg17]. JTD
6. ~Proposed Order: 10/11/17.

RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge
for **01/30/19**.

(lh)

Future Hearing: 8/01/18: Accounting Review - VACATE

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 01/24/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700993

CASE NAME: RONNIE G BARTON

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

TAMARA S JACOBI (PET)...CALDWELL, KENNEDY & PORTER
RONNIE G BARTON (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Tamara S Jacobi (daughter/nominee)

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

1. All heirs liquidated funds to be placed in attorney client trust account in lieu of bond. Estimated net value of estate is \$231,000. The court may for good cause require that a bond be given, either before or after issuance of letters (Prob. Code, § 8481(b)). JTD
2. ~Proposed form Order: 10/04/17

RECOMMENDATION:

RFA, Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **04/03/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/24/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1701241

CASE NAME: JAMES E GENTRY LIVING TRUST

HEARING:
Petition for Order confirming trust assets & determining
validity of trust

COUNSEL:
DOUGLAS E GENTRY (PET)...CALDWELL, KENNEDY & PORTER
JAMES E GENTRY LIVING TRUST (TRU)...

Currently under review by legal research.

(LR)

Notice of Hearing and Proof of Service filed 12/20/17; however, mailing list not
attached to proof of service as alleged.

Need Notice of Hearing and Proof of Service as to William Gentry, Douglas Gentry,
Linda Anderson, and Pamela Bogner.

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 01/24/18 TIME: 8:30 DEPT: S35P

CASE#: VPR VS003101

CASE NAME: MATTER OF THE MC SPICER TRUST
SEE ALSO 15 15A

HEARING:

FIFTH Account and Report of CHARLES KING, MILBRY CLEYO SPICER
and Petition for allowance of fees filed.

COUNSEL:

CHARLES KING	(PET)...CALDWELL, KENNEDY & PORTER
MILBRY ATISHA CLEYO SPICER	(PET)...CALDWELL, KENNEDY & PORTER
MILBRY CLEYO SPICER	(DEC)...
RANDOLPH STEWARD	(PET/APP)...
MILBRY CLEYO SPICER TRUST	(TRU)...
RANDECCA C STEWARD	(RES)...PRO/PER

Waiver of Court Fees and Costs filed by RANDOLPH WILL STEWARD is GRANTED
TOTAL FEES WAIVED TO DATE: \$525.00

XREF: VPRVS002838 ESTATE OF MILBRY C SPICER

GENERAL INFORMATION

Continued from **05/17/17**.

Continued from 11/15/17. Court makes orders re filing of objections and Pretrial Orders. Fifth Account is contested. Trial estimate is two and a half days. Court set exchange deadline for 4PM on 01/24/18.

THIS CASE SET FOR HEARING ON 5th Account, Petition for Fees and Petition for Leave to Resign and Discharge Pr.C. §§ 15640(d) 17200(b)(1) by Charles King and Milbry Cleyo Spicer, Successor Trustees.

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

1. Accounting period 03/31/13 – 02/29/16.
2. Assets on hand \$3,912.56.
3. Counsel Kennedy request fees of \$8,776.25 for 96.45 hours at \$100/300 per hour for paralegal and attorney service. Itemized [Acct. 03/08LFpg17-21]. JTD
4. Counsel Kennedy requests that a judgment be entered against Randolph Steward for the combined total of \$25,123.75 for additional attorney's fees for

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filing bad faith petitioner and under the authority of *Rudnick v. Rudnick (2009)* 179 Cal. App. 4th 1328. Itemized [Acct. 03/08LFpg21-30]. JTD

5. Trustees waive compensation.
6. Trustees seek to resign as the trust consists of judgments against the trust. The real property is in tax arrears since 2009 and after fees there will be no assets. Trustees have assigned all interest in all judgments owed to trust.
 - a. **Assignment of Interest filed 11/15/17.**
 - b. Prayer states administration is ongoing. Question who will oversee the judgments if petitioners resign? **Supp. 01/17/18 requests court to appoint public administrator. JTD**
7. Resignations by co-trustees, Charles King and Milbry Cleyo filed 07/05/17.
8. Notice of Appeal Default filed 04/11/16.
9. Declaration by Randolph Steward re property taxes filed 07/05/17.
10. Response to Declaration of Randolph Steward by co-trustees, Charles King and Milbry Cleyo, filed 07/05/17.
11. **Notice of Stay with Memorandum and Evidentiary Objections by Randolph Steward filed 12/12/17.**
12. **Objection to Fifth Account and Report by Randolph W Steward filed 12/12/17. Need proof of service.**
13. **Response to Objections, Notice of Stay, Memorandum, and Appendix to Exhibits by co-trustees, Charles King and Milbry Cleyo filed 01/06/18.**
14. Proposed order submitted 03/08/17; however, resignation etc is not clear, accounting period is not stated and assets on hand are not stated. Submit order after hearing.

RECOMMENDATION

Matter is contested.

Court's discretion. If approved, set future hearing for Accounting/Status Review on **03/21/18**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

(lc/lh)

Future Hearings: VACATED - 2/22/18-2/23/18: Court Trial

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

DATE: 01/24/18 TIME: 8:30 DEPT: S35P

CASE#: VPR VS003101

CASE NAME: MATTER OF THE MC SPICER TRUST

SEE ALSO 14 15A

VACATED

HEARING:
Readiness Calendar

COUNSEL:

CHARLES KING	(PET)...CALDWELL, KENNEDY & PORTER
MILBRY ATISHA CLEYO SPICER	(PET)...CALDWELL, KENNEDY & PORTER
MILBRY CLEYO SPICER	(DEC)...
RANDOLPH STEWARD	(PET/APP)...
MILBRY CLEYO SPICER TRUST	(TRU)...
RANDECCA C STEWARD	(RES)...PRO/PER

Waiver of Court Fees and Costs filed by RANDOLPH WILL STEWARD is GRANTED

XREF: VPRVS002838 ESTATE OF MILBRY C SPICER

Future Hearings: 2/22/18-2/23/18: Court Trial.

Readiness—no notes—JTD

Superior Court of Calif, County of San Bernardino
Page: 15A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 01/24/18 TIME: 8:30 DEPT: S35P

CASE#: VPR VS003101

CASE NAME: MATTER OF THE MC SPICER TRUST
SEE ALSO 14 15
HEARING:
Hearing Re: TRIAL SETTING CONFERENCE

COUNSEL:
CHARLES KING (PET)...CALDWELL, KENNEDY & PORTER
MILBRY ATISHA CLEYO SPICER (PET)...CALDWELL, KENNEDY & PORTER
MILBRY CLEYO SPICER (DEC)...
RANDOLPH STEWARD (PET/APP)...
MILBRY CLEYO SPICER TRUST (TRU)...
RANDECCA C STEWARD (RES)...PRO/PER

Waiver of Court Fees and Costs filed by RANDOLPH WILL STEWARD is GRANTED

XREF: VPRVS002838 ESTATE OF MILBRY C SPICER

TSC—no notes—JTD

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 01/24/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1700872

CASE NAME: JOYCE A HOCHENBERRY 2002 REVOCABLE TRUST,

HEARING:

Petition for TO COMPEL ACCOUNTING AND PRODUCTION OF TRUST
RELATED DOCUMENTS;REMOVE TRUSTEE;APPOINT SUCCESSOR

COUNSEL:

CHARLES BUCHANAN (PET)...ROSS LAW GROUP, APC
JOYCE A HOCKENBERRY 2002 REVOCABLE TRUST (TRU)...

Currently under review by Legal Research.

(LR)

Notice was given.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIPS

DATE: 01/24/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700110

CASE NAME: ALEXANDRA A VARELA AGUIRRE

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of GUILLERMINA VARELA

COUNSEL:

GUILLERMINA VARELA (PET)...PRO/PER

ALEXANDRA A VARELA AGUIRRE (CTP)...

Waiver of Court Fees and Costs filed by ALEXANDRA A VARELA AGUIRRE is GRANTED

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Guillermina Varela appointed Conservator of the person of Alexandra Varela Aguirre on 06/21/17
2. Notification of Conservatee's rights, Determination of Conservatee's Appropriate Level of Care, and Care Plan **filed 01/18/18; however, not in LF at time of review.**

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/24/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700171

CASE NAME: STANLEY JOSE ZAMORA MOLINA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of LUISA ZAMORA

COUNSEL:

LUISA ZAMORA (CP)...
ERICK JOSE ZAMORA (CP)...PRO/PER
STANLEY JOSE ZAMORA MOLINA (CTP)...BRYAN C HARTNELL

Waiver of Court Fees and Costs filed by LUISA ZAMORA is GRANTED
Waiver of Court Fees and Costs filed by ERICK JOSE ZAMORA is GRANTED

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Luisa Zamora and Erick Zamora appointed limited co-conservators of the person of Stanley Molina on 06/21/17.
2. Care Plan and Notification of Conservatee's Rights filed 01/04/18.
3. **Need** a Determination of Conservatee's Appropriate Level of Care per Pr.C. §2352.5 (form GC-355).

RECOMMENDATION

Inquire status.

(lh)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 01/24/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700261

CASE NAME: MTR OF ELLA MARIE BODELL

HEARING:
Petition for Appointment of Conservator

COUNSEL:
DAVID BODELL (CPE)...TREVOR D. MARTIN
ELLA MARIE BODELL (CEP)...SANDY L. TURNER
PLATTE RIVER INSURANCE (TP)...

GENERAL INFORMATION

David Bodell appointed temporary Conservator on 07/18/17, person and estate; \$105,000 bond. Court noted that if motion for substituted judgment is filed, it shall be set on same date 08/23/17.

Continued from 08/23/17. Sandy Turner appointed counsel. No IRC report required.
Continued from 10/25/17.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by David Bodell, brother

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

1. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, however, court appointed counsel per Pr. C. § 1470. Report of Counsel Turner filed 09/18/17.
2. Petitioner seeks bond of \$105,000. Appears ok. Court to clarify if there is income or SNT.
3. Petitioner seeks medical powers. Capacity Declaration filed 10/31/17.
4. Return of Citation filed 11/09/17.
5. Proof of Completion of the Conservatorship Training Class filed 11/02/17.
6. CI Report filed 08/07/17.
7. ~Proposed Form Order: 07/11/17.

RECOMMENDATION

Court's discretion. If approved, set hearing for Compliance Review for **08/29/18** for the filing of the required documents and hearing re Accounting Review for **01/30/19**. Any accounting to be filed 30 days in advance. (lc/lh/lc/lh)

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

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 01/24/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700452

CASE NAME: ELSIE CHRISTINE TAYLOR

SEE ALSO 21

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CAROL DELORES ST. JOHN (CPE)...GEORGE F DICKERMAN
ELSIE CHRISTINE TAYLOR (CEP)...

XREF: CONPS1700456 RICHARD LLOYD TAYLOR

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Carol St. John, daughter

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

1. Petitioner seeks bond of \$26,400.
2. Petitioner seeks powers under Pr. C. §2590 to pay, collect, compromise, or adjust claims/debts, or demands. JTD.
3. Petitioner seeks medical powers. **Need** Capacity Declaration.
4. List of required contacts does not include grandchildren: Lora St. John, Karen Irwin, Kim Bagwell, or Crissy Diaz. **Need** completed form.
5. **Need** Due Diligence Declaration as to grandchildren: Lora St. John, Karen Irwin, Kim Bagwell, and Crissy Diaz .
6. **Need** return of citation.
7. **Need** Certificate of Completion of the Conservatorship Training Class.
8. **Need** Court Investigator report.
9. ~Proposed Form Order: 12/14/17

RECOMMENDATION

Need to clear notes 3-8. If approved, set hearing for Compliance Review for **08/29/18** for the filing of the required documents and hearing re Accounting Review for **04/03/19**. Any accounting to be filed 30 days in advance. (lh)

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

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 01/24/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700456

CASE NAME: RICHARD LLOYD TAYLOR

SEE ALSO 20

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CAROL DELORES ST. JOHN (CPE)...GEORGE F DICKERMAN
RICHARD LLOYD TAYLOR (CEP)...

XREF: CONPS1700452 *ELSIE CHRISTINE TAYLOR (spouse)*

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Carol St. John, step-daughter

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

1. Petitioner seeks bond of \$26,400.
2. Petitioner seeks powers under Pr. C. §2590 to pay, collect, compromise, or adjust claims/debts, or demands. JTD.
3. Petition, item #11, does not include Lisa Knight, Jason Schreiner, Jon Schreiner, Jennifer Parsley, Lora St. John, Karen Irwin, Kim Bagwell, or Crissy Diaz, who are all listed as grandchildren in x-ref matter regarding petition for conservatorship of Else Taylor, spouse. **Need verified supplement clarifying relatives.**
4. **Need Due Diligence Declaration as to Tessa Pecanis, granddaughter.**
5. **Need Notice of Hearing and Proof of Service as to Veteran's Administration per Pr. C. §1461.5.**
6. **Need** return of Citation.
7. **Need** Certificate of Completion of the Conservatorship Training Class.
8. **Need** Court Investigator report.
9. ~Proposed Form Order: 12/14/17

RECOMMENDATION

Need to clear notes 3-8. If approved, set hearing for Compliance Review for **08/29/18** for the filing of the required documents and hearing re Accounting Review for **04/03/19**. Any accounting to be filed 30 days in advance.

(lh)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 01/24/18 TIME: 9:30 DEPT: S35P

CASE#: SC SS02341
CASE NAME: MATTER OF MAURICE J BARES

HEARING:
FIFTH Account and Report of VERLENE CAMERON and Petition for allowance of fees filed.

COUNSEL:
JOHN D MICKUS (CE)...JOHN D MICKUS
MAURICE J BARES (CTE/CEP)...
VERLENE CAMERON (CE/SC/CPE)...JOHN D MICKUS
DEPT. OF DEVELOPMENTAL SERVICES (TP)...PRO/PER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 5th Account Current and Petition for Fees by Verlene Cameron, Conservator

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

1. Account period covers 10/31/15 to 10/31/17.
2. Assets on hand \$125,492.58, cash
3. Petitioner requests fees of \$4,375 billed at \$125/hour for 35 hours. Itemized [12/14/17 Accounting LF p.22-24]. **JTD**
4. Attorney requests fees of \$2,530.50 billed for attorney at \$350/hour and paralegal at \$105/hour for a total of 8 hours. Itemized [12/14/17 Accounting LF p.26]. **JTD**
5. Current bond is \$149,500. **Petitioner requests bond increase of \$27,000, totaling \$176,500. Appears sufficient. JTD**
6. Notice given.
7. ~Proposed Order: 01/18/18

RECOMMENDATION:

Court's discretion. If approved, set hearing re next Accounting Review for **01/06/19** (if one year) or **01/05/20** (if two years). Accounting to be filed 30 days in advance.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

PROBATE

DATE: 01/24/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500564

CASE NAME: Annabelle Childress

HEARING:

First and final Account and Report of CATHERINE ROUNTREE and
Petition for allowance of fees filed.

COUNSEL:

ANNABELLE CHILDRESS	(DEC)...
REGINA NITASHA HOWARD	(PET)...PRO/PER
CATHERINE ROUNTREE	(PET)...LINDA ROBERTS ROSS
CLORINDA CHILDRESS	(TP)...PRO/PER

GENERAL INFORMATION:

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

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

1. Assets on hand: \$218,350.91, cash
2. Petitioner seeks statutory compensation of \$11,661.98.
3. Attorneys request statutory fees of \$11,661.98. Calculated.
 - a. Attorney Bert Kawahara was initially hired to represent the administrator but was later substituted for attorney Linda Roberts-Ross. The attorneys seek court approval of their attached stipulation to split statutory fees in the amount of **\$1,000 to Mr. Kawahara**, and remaining **\$10,661.98 to Ms. Roberts-Ross**. [Accounting, 10/27/17, LFpg195-197]. **JTD**.
4. Attorney seeks extraordinary fees in the amount of **\$11,789.80**, including **\$513.80** for costs advanced for representation of administrator for litigation regarding will contest and unlawful detainer action. Itemized. [Accounting, 10/27/17, LFpg189-193]. **JTD**
5. Petitioner requests reserve of **\$2,000** for final closing expenses. **JTD**
6. Petitioner requests reimbursement of **\$16,582.87** for costs advanced to estate. Itemization and receipts attached at Exhibit E. [Accounting, 10/27/17, LFpg149]. **JTD**

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

7. **Need** bank statement re CitiBank acct #3464 verifying assets on hand per Local Rule 20-908.
8. **Need Notice of Hearing and Proof of Service as to Clorinda Childress, including service of a copy of accounting.**
9. No proposed order submitted.

RECOMMENDATION:

Need to clear notes 7-8, then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **01/30/19**.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/24/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600036

CASE NAME: CARL J HUNT

HEARING:
Accounting Review

COUNSEL:
JEFF HUNT (PET)...JOHN F WEBER
CARL J HUNT (DEC)...

GENERAL INFORMATION

Continued from **05/03/17** and **08/02/17**. Counsel to file final accounting.
Continued from 10/04/17 and 11/08/17. This is the last continuance by telephone.
Continued form 12/13/17.

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Jeff Hunt, son, on 04/01/16; full authority, no bond.
2. Final Inventory and Appraisal filed 06/02/16.
3. Waiver of account filed by other heir Tracy Hunt. However, notwithstanding said waivers, petitioner must file a final report of administration per Pr. C. § 1064 and Pr. C. §10954(c)(1) or Status Report of Administration per Pr. C. §12201.

RECOMMENDATION

Inquire status of accounting or waiver of accounting.

(lc/ww/lh)

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

DATE: 01/24/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600294

CASE NAME: MTR OF BOBBIE JEAN BOYD

HEARING:

Hearing re Final Discharge

COUNSEL:

JAMES BOYD

BOBBIE JEAN BOYD

(PET)...ANDERSON & LEBLANC

(DEC)...

GENERAL INFORMATION

Continued from 12/13/17 at request of Court. No appearance, nor has Ex Parte Petition for Final Discharge been filed.

THIS CASE IS SET FOR HEARING ON Final Discharge re James Boyd

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

1. Petitioner James Boyd is sole beneficiary.
2. Need Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b).

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/24/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600656

CASE NAME: MTR OF CYNTHIA MARIE THOMAS-WILLIAMSON

HEARING:
Accounting Review

COUNSEL:

DELMAR THOMAS (PET)...HOLSTROM BLOCK & PARKE
CYNTHIA MARIE THOMAS-WILLIAMSON (DEC)...

GENERAL INFORMATION:

Continued from **10/31/17 and 12/19/17** at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued 08/23/17, full authority, no bond.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb/lh)

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

DATE: 01/24/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600960

CASE NAME: MTR OF THOMAS R MEYER

HEARING:

Waiver of Account and Report of DORIS NEWBERGER and Waiver of Fees

COUNSEL:

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

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Waiver of Account and Report, Waiver of Statutory Fees by Doris Newberger, administrator

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

1. **Need** verified supplement to include current assets on hand per CRC 7.550.
2. **Need** verified supplement indicating if cash has been invested and maintained in an interest bearing account. Pr.C. § 1064(a)(5).
3. **Need** bank statement verifying ending balance per Local Rule 20-908.
4. **Need** verified supplement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary. Pr. C. § 1064 (a)(4).
5. **Need** Notice of Hearing and proof of service as to Donna Martin.
6. Petitioner waives statutory compensation.
7. Subsequent to the Final Inventory and Appraisal filing on 12/19/16, it was discovered the Bank of America IRA account valued at \$5,262.06 had a named beneficiary and should therefore be excluded as an asset. However, petitioner does not seek statutory compensation. Does Court wish to require a corrected final I&A? **JTD.**
8. ~Proposed order: 12/12/17

RECOMMENDATION:

Need to clear notes 1-5, then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **01/30/19**.

(lh)

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

DATE: 01/24/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700026

CASE NAME: MTR OF PECOLIA MCFARLAND

SEE ALSO 7 8

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

PENISHA MCFARLAND	(PET)...MICHAEL C MADDUX
PECOLIA MCFARLAND	(DEC)...
TONYA MICHAELS	(PET)...PRO/PER
MICHAEL MICHAELS	(OBJ)...MANSOUR LAW GROUP, APLC
STATE OF CALIFORNIA FRANCHISE TAX BOARD (PRO/PER)	

GENERAL INFORMATION

Letters of Special Administration issued to Penisha McFarland, daughter, on 01/31/17, no bond.

Continued from **03/21/17**. Michael Michaels to retain counsel and file a competing petition. Court amends powers of the Special Administrator and removes the right to evict and removes the power to evict or access bank accounts or sell real property. Bond required \$50,000. Court notifies the Public Administrator of possible appointment. No bond or competing petition filed as of the review of this matter.

Continued from **06/13/17** to be heard with competing petition.

Continued from **09/18/17** for matter to be heard by Judge Welch. Deadline of 11/03/17 for Counsel Maddux to file/serve supplement.

Continued from 11/27/17. Matter is contested. Parties to attend mediation.

THIS CASE IS SET FOR HEARING ON

- Petition 1 Petition for Letters of Administration with full IAEA by ***Penisha McFarland, daughter***
- Petition 2 Petition for Letters of Administration with full IAEA by ***Tonya and Michael Michaels, niece and nephew-in-law***

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

Petitioner 1 Penisha McFarland, daughter

1. Bond waived by Penisha McFarland (sole heir); Court has discretion to require bond per Pr. C. §8481(b). – **JTD**. General petition shows an estimated estate value of \$303,072, whereas Special petition alleges value unknown. Estate assets include real property. **NOTE: Order entered 01/31/17 does not include bond. However, on 03/21/17 court ordered \$50,000 bond as Special Administrator; bond filed.**
2. Final Inventory and Appraisal filed 10/10/17 showing all assets are real properties valued at a total of \$785,000.00
3. **Objections filed 03/13/17 by Michael Michaels.**
4. **Reply to Objection filed 04/03/17 by Penisha McFarland.**
5. **Objections filed 06/06/17 by Tonya Michaels.**
6. **Objections and opposition to Penisha's objections (Reply) filed 09/11/17; however, need verification per Pr.C. § 1021. JTD.**
7. **Objections to Creditor's Claims and Final Appraisal by Tonya and Michael Michaels filed 11/15/17; however, need verification and proof of service.**
8. ~Proposed form Order: 04/03/17

Petitioner 2 Tonya and Michael Michaels, niece and nephew-in-law

9. Petitioner requests bond of \$50,000. Estate value is currently unknown and will be determined.
10. Section 5a2 is incomplete as to spouse's status. Need verified supplement. **Supp (09/15/17) does not indicate whether no spouse due to divorce, never married or if spouse is deceased. Need amended verified supplement. Supp. (11/15/17) has the same issue as above. Court may wish to clarify if decedent was ever married or if spouse is deceased. JTD**
11. Notice to Petition to Administer Estate and proof of service filed 06/08/17; however, section 10 is missing the names of the petitioners. Need corrected notice. **Supp (11/15/17) indicates that their names should be in section 10. (See note 12). JTD**
12. Notice of Petition to Administer Estate and proof of service filed on 11/15/17; however, section 3 is missing petitioners' names and section 10 indicates that address and telephone of petitioners are "same as above" when the party information in the caption heading does not publish on the proof of publication. **Need completed notice.**
13. **Objection by Penisha McFarland, special administrator, filed on 06/29/17; however, need verification by Penisha and proper proof of service of objections.**
14. ~Proposed Form Order: 06/06/17

RECOMMENDATION

Matter is contested. Need to clear notes 7, 12 & 13 then Court's discretion re bond and remaining notes. If approved, set Accounting/Status Review for **02/04/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908. (lh/nb/lh/nb/ww/lh)

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

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 01/24/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700026

CASE NAME: MTR OF PECOLIA MCFARLAND

SEE ALSO 6 8

HEARING:

Petition for DETERMINE TITLE TO REAL PROPERTY; OR IN THE
ALTERNATIVE FOR UNJUST ENRICHMENT

COUNSEL:

PENISHA MCFARLAND (PET)...MICHAEL C MADDUX
PECOLIA MCFARLAND (DEC)...
TONYA MICHAELS (PET)...PRO/PER
MICHAEL MICHAELS (OBJ)...MANSOUR LAW GROUP, APLC
STATE OF CALIFORNIA FRANCHISE TAX BOARD (PRO/PER)

Waiver of Court Fees and Costs filed by PENISHA MCFARLAND is GRANTED

Waiver of Court Fees and Costs filed by MICHAEL MICHAELS is GRANTED

Waiver of Court Fees and Costs filed by TONYA MICHAELS is GRANTED

Currently under review by Legal Research.

(LR)

Notice:

Need return of served Summons per Pr. C. § 851 as to Respondent, Penisha
McFarland.

(ww)

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

DATE: 01/24/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700026

CASE NAME: MTR OF PECOLIA MCFARLAND

SEE ALSO 6 7

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

PENISHA MCFARLAND (PET)...MICHAEL C MADDUX
PECOLIA MCFARLAND (DEC)...
TONYA MICHAELS (PET)...PRO/PER
MICHAEL MICHAELS (OBJ)...MANSOUR LAW GROUP, APLC
STATE OF CALIFORNIA FRANCHISE TAX BOARD (PRO/PER)

Waiver of Court Fees and Costs filed by PENISHA MCFARLAND is GRANTED

Waiver of Court Fees and Costs filed by MICHAEL MICHAELS is GRANTED

Waiver of Court Fees and Costs filed by TONYA MICHAELS is GRANTED

See notes on prior matter #6.

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

DATE: 01/24/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700324

CASE NAME: MTR OF LINDA JOYCE WHITE BARRY

HEARING:

Petition for PROBATE LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

JOHNNY BARRY	(PET)...JOSEPH JOOHYUN PARK
LINDA JOYCE WHITE BARRY	(DEC)...
MARCIA L HEAD	(PET)...JOHN G WURM

GENERAL INFORMATION

Continued from **07/05/17**. Counsel represents that Jerry Williams resides in Georgia. Matter to be heard with contested petition.

Continued from **09/28/17**. Parties are working on a settlement agreement.

Continued from 11/06/17. Parties are close to settlement.

Continued from 12/12/17. Parties have reached an agreement. Hearing continued; notice to be given by Attorney John Wurm.

THIS CASE SET FOR HEARING ON:

- Petition 1-Petition for Letters of Administration with full IAEA by ***Johnny Barry, spouse***
- Petition 2- Petition for Letters of Administration with Full IAEA by ***Marcia Head, sister***

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

Petitioner 1 Johnny Barry, spouse

1. Petitioner seeks bond of \$200,000. Ok.
 - a. Per supplement filed on 06/30/17 petitioner now seeks that no bond be required. Does court wish for bond waivers to be filed? JTD
2. Petitioner is not listed in section 8; however, it is clear that Petitioner is spouse. Does court wish to require verified supplement? JTD

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

- a. Supplement filed on 06/30/17 indicating that the petitioner is the spouse, and requests that petition should be amended to reflect limited IAEA and delete the \$200,000 bond requirement. Does Court wish for petition to be amended per the supplement? JTD
3. Sibling Jerry Williams' address is allegedly unknown. Need due diligence.
 - a. Supplement filed on 06/30/17 states that a due diligence as to Jerry Williams was completed and attached as exhibit A; however exhibit A was not attached. **Need** verified supplement.
 - b. Declaration of due diligence as to Jerry Williams filed on 06/30/17. JTD
4. **Need** Notice of Petition to Administer Estate served on Jeremey Head, issue of Carwell Head, Jr.
5. **Objections by Marcia Head, sister, filed on 06/08/17.**
6. ~Proposed Form Order: 03/28/17.

Petitioner 2 Marcia Head, sister

7. Petitioner requests bond of \$225,000. Ok.
8. Notice to Petition to Administer Estate and proof of service filed on 07/21/17; however, notice was not served on Jeremey Head. **Due Diligence Declaration re Jeremy Head filed 12/15/17. JTD**
9. ~Proposed Form Order: 06/08/17

RECOMMENDATION

Matter is contested. Need to clear notes 3, 4. Court's discretion re bond. If approved, set Accounting/Status Review for **04/03/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/ww/nb/lh).

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

DATE: 01/24/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700784

CASE NAME: MTR OF MI YANG

HEARING:

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

COUNSEL:

CHOONG GEOL YANG (PET)...ANDREW KIM
MI YANG (DEC)...

GENERAL INFORMATION:

Continued from 11/07/17. No assets at this time – wrongful death litigation pending.
Note 3 cleared, the brother (petitioner) is the sole heir.

Continued from 12/19/17 to clear probate notes.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full
authority under IAEA by brother, Choong Geol Yang ["Petitioner"]

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

1. Petition alleges all heirs waive bond. However, the only bond waiver is signed
by Attorney Kim. **Need** Mandatory Waivers of Bond by Heir or Beneficiary.
Estimated value of estate is not given. The Court may for good cause require
that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c).
2. Section 5(7) or (8) to petition regarding issue of a predeceased child is blank.
Need verified supplement.
3. **Need** proof of publication.
4. Petitioner alleges that petitioner is the sole beneficiary and waives bond.
5. ~Proposed Form Order/Letters 08/04/17.

RECOMMENDATION:

Need to clear notes 1-3 then Court's discretion re: bond. If approved, set future
hearing for Accounting/Status Review on **04/03/19**. Any account to be filed 30 days' in
advance of hearing. Note requirements of Local Rules.

(nb/lh)

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

DATE: 01/24/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700785

CASE NAME: DOROTHY JANE GODDARD

HEARING:

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

COUNSEL:

DEAN DILLON BROWN	(PET)...HORSPOOL & HORSPOOL
DOROTHY JANE GODDARD	(DEC)...
TIMATHENA NADINE GODDARD	(OBJ)...PRO/PER

GENERAL INFORMATION:

Continued from 11/07/17. Travis Goddard objects to the petition, written objections to be filed prior to next hearing or the objections will be deemed waived.
Continued from 12/19/17. Objections to be filed by 12/18/17.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by grandson, Dean Dillon Brown ["Petitioner"].

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

1. Petition is not signed or dated by Attorney Martin. **Need same.**
2. Petitioner requests bond be fixed in the amount of \$20,000 and anything in excess of \$20,000 be placed in a blocked account at Pacific Premier Bank in Redlands, CA. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c).
3. Proof of publication filed.
4. **Objections by Timanthena Goddard filed 12/18/17 with proof of service.**
5. ~Proposed Form Order/Letters 08/04/17.

RECOMMENDATION:

Matter is contested.

Need to clear note 1, then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **04/03/19**. Any account to be filed 30 days' in advance. Note requirements of Local Rules.

(nb/lh)

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

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 01/24/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700934

CASE NAME: JOAN D SAUNDERS

HEARING:

Petition to determine succession to Real Property

COUNSEL:

STEPHANIE E ELIOT	(PET)...MEDEIROS & ASSOCIATES
SHERRY L POWELL	(PET)...MEDEIROS & ASSOCIATES
JAMES S SAUNDERS JR	(PET)...MEDEIROS & ASSOCIATES
JOAN D SAUNDERS	(DEC)...

GENERAL INFORMATION

Continued from 12/13/17 to clear probate notes.

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property and Personal Property by Stephanie Eliot, Sherry Powell and James Saunders, Jr.

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

1. Petitioners seek 100% interest, 33.33% each; in decedent's 100% interest; in real property and personal property per the will.
2. The attached Inventory and Appraisal in not appraised by a probate referee.
Need corrected Inventory and Appraisal.
3. ~Proposed Form Order: 10/12/17

RECOMMENDATION

Need to clear note 2, then Court's discretion.

(lh)

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

DATE: 01/24/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701074

CASE NAME: FAYE ELISE GOODMAN

HEARING:

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

COUNSEL:

BARBARA LEE LANTZ (PET)...LAW OFFICE OF SOLOMON A. CHEIF
FAYE ELISE GOODMAN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Barbara Lee Lantz, executor/daughter

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

1. Will waives bond. Estimated net value of estate is \$435,000 consisting of \$10,000 cash and remainder in real property. The court may for good cause require that a bond be given, either before or after issuance of letters (Prob. Code, § 8481(b)). JTD
2. Attached will is missing page 1, and attached codicils are partially holographic.
 - a. **Need** verified supplement with a complete copy of will.
 - b. **Need** typewritten copy of codicils per Pr. C. §8002.
3. **Need** Notice of Petition to Administer Estate with proof of service (form DE-121).
4. **Need** Proof of Publication.
5. No proposed Order submitted.

RECOMMENDATION:

Need to clear notes 2-4. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **04/03/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

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

DATE: 01/24/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701075

CASE NAME: DIRK JAMES LOCEY

HEARING:
Petition for ANCILLARY Letters of Administration

COUNSEL:
JAN CROOKS (PET)...MCCARTHY LAW FIRM
DIRK JAMES LOCEY (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Ancillary Petition for Letters of Administration with full authority under IAEA by Jan Crooks, sister/personal representative

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

1. Petitioner is the sole heir and personal representative in Washington probate. Estimated net value of estate is \$110,000, real property. The court may for good cause require that a bond be given, either before or after issuance of letters (Prob. Code, § 8481(b)). JTD
2. ~Proposed form Order: 11/03/17

RECOMMENDATION:

RFA, Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **04/03/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.
(lh)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 01/24/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701076

CASE NAME: RICHARD WESLEY GROVE

HEARING:

Petition for Letters of Administration with Full IAEA

COUNSEL:

DENNIS M MARTIN	(PET)...PRO/PER
CAROLE ANN MARTIN	(PET)...PRO/PER
RICHARD WESLEY GROVE	(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Dennis Martin (brother-in-law) and Carole Martin (sister)

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

1. All heirs purportedly waive bond. Estimated net value of estate is \$557,000, consisting of \$107,000 in personal property and remaining in real property. The court may for good cause require that a bond be given, either before or after issuance of letters (Prob. Code, § 8481(b)). JTD
2. Decedent was survived by siblings. Petition, item #8, list of relatives indicates decedent had a predeceased sibling, Joan Brewer. Question if Joan Brewer was survived by issue? **Need verified supplement.**
3. ~Proposed form Order: 10/25/17

RECOMMENDATION:

Need to clear note 2. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **04/03/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

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

DATE: 01/24/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701264

CASE NAME: MTR OF BERNARD DOMROY

HEARING:

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

COUNSEL:

JUDI DOMROY (PET)...BENJAMIN H BERKLEY
BERNARD DOMROY (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full
authority under IAEA by Judi Domroy, niece

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

1. Bond waived by both heirs. Estimated net value of estate is \$627,485.32,
consisting of \$8,581.57, cash, and remaining in real property. Court also has
discretion to require bond per Pr. C. § 8481(b).
2. Petition is incomplete at item #3(g)(2) as to relationship to decedent; however, it
appears petitioner is a niece.
3. **Need** Notice of Petition to Administer Estate.
4. **Need** Proof of Publication.
5. No proposed Order submitted.

RECOMMENDATION:

Need to clear notes 3-4. Court's discretion re bond. If approved, set future hearing for
Accounting/Status Review on **04/03/19**. Any accounting to be filed 30 days in
advance. Note requirements of Local Rules.

(lh)

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

DATE: 01/24/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300104

CASE NAME: KENNETH DEWAYNE DOERR
SEE ALSO 18
HEARING:
Hearing Re: Status/Review

COUNSEL:
STEPHANIE GAMBLE (CPE)...PRO/PER
KENNETH DEWAYNE DOERR (CEE)...

XREF: CONPS1300105 DONALD WAYNE DOERR JR

GENERAL INFORMATION

Continued from 09/06/17. Mother, Cheryl Doerr, states she retained Attorney Carrie Justice and is requesting a continuance for her to be present.

Continued from 11/08/17 for both attorneys to be present.

Continued from 11/29/17. Parties ordered to report to Family Court Services and cooperate fully with Child Custody Recommending Counselor during all stages of mediation/evaluation. Custodial parent(s) to make children available at all time as requested by Counselor. Referral to FCS filed.

THIS CASE SET FOR HEARING ON Status/Review.

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

1. Matter set on 07/12/17 when there were concerns of Court Investigator report. After review of all pertinent documents (APS report, Court investigator's report and court appointed counsel's report), the Court finds there are no care issues or abuse issues. Any further concerns, parties to file petitions/documentation.
2. **Need FCS Report.**

RECOMMENDATION

Need FCS report, then Court's discretion.
(lc/lh)

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

DATE: 01/24/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300105

CASE NAME: DONALD WAYNE DOERR JR

SEE ALSO 17

HEARING:

Hearing Re: Status/Review

COUNSEL:

STEPHANIE GAMBLE (CP)...PRO/PER
DONALD WAYNE DOERR JR (CEE)...

XREF :CONPS1300104 *KENNETH DEWAYNE DOERR*

GENERAL INFORMATION

Continued from 09/06/17. Mother, Cheryl Doerr, states she retained Attorney Carrie Justice and is requesting a continuance for her to be present.

Continued from 11/08/17 for both attorneys to be present.

Continued from 11/29/17. Parties ordered to report to Family Court Services and cooperate fully with Child Custody Recommending Counselor during all stages of mediation/evaluation. Custodial parent(s) to make children available at all time as requested by Counselor. Referral to FCS filed.

THIS CASE SET FOR HEARING ON Status/Review.

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

1. Matter set on 07/12/17 when there were concerns of Court Investigator report. After review of all pertinent documents (APS report, Court investigator's report and court appointed counsel's report), the Court finds there are no care issues or abuse issues. Any further concerns, parties to file petitions/documentation.
2. **Need** FCS Report.

RECOMMENDATION

Need FCS Report, then Court's discretion.

(lc/lh)

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

DATE: 01/24/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600014

CASE NAME: MTR OF GLORIA THORNTON

SEE ALSO 20

HEARING:

Accounting Review

COUNSEL:

NATALIE BLICKENSTAFF	(PET)...JENNIFER M DANIEL
GLORIA THORNTON	(PET)...JEANNE E KENNEDY
DAVID LANDO	(CP)...ROBERTA L. TAYLOR & ASSOC
JEANNE E KENNEDY	(PET)...JEANNE E KENNEDY
GLORIA THORNTON	(CEE)...JEANNE E KENNEDY

GENERAL INFORMATION

Continued from 11/08/17 to file an accounting.

THIS CASE IS SET FOR HEARING ON Accounting Review of conservator Natalie Blickenstaff

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

1. Natalie Blickenstaff appointed Conservator of the person and estate on 07/07/16 \$100,000 bond, and was also appointed Successor Trustee on same day.
2. **Need** first accounting or waiver for conservatorship estate.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 01/24/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600014

CASE NAME: MTR OF GLORIA THORNTON

SEE ALSO 19

HEARING:

Accounting Review

COUNSEL:

NATALIE BLICKENSTAFF	(PET)...JENNIFER M DANIEL
GLORIA THORNTON	(PET)...JEANNE E KENNEDY
DAVID LANDO	(CP)...ROBERTA L. TAYLOR & ASSOC
JEANNE E KENNEDY	(PET)...JEANNE E KENNEDY
GLORIA THORNTON	(CEE)...JEANNE E KENNEDY

GENERAL INFORMATION

Continued from 11/08/17 to file an accounting.

THIS CASE IS SET FOR HEARING ON Accounting Review of Successor Trustee,
Natalie Blickenstaff

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

1. Natalie Blickenstaff was appointed Successor Trustee on 07/07/16.
2. **Need** first accounting of trust.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 01/24/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600032

CASE NAME: JACQUELINE BEARCE

HEARING:

Conservatorship Compliance Review Hearing on SUPPLEMENTAL
PETIITON FOR CONSERVATORSHIP of SHERI L KASTILAHN

COUNSEL:

ROBERT L BEARCE	(PCR)...PRO/PER
SHERI L KASTILAHN	(PET)...SHERRI L KASTILAHN
KATHLEEN BEARCE CLARKE	(CPE)...PRO/PER
JACQUELINE BEARCE	(CEE)...PRO/PER

GENERAL INFORMATION

Continued from 11/08/17 to clear probate notes.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Kathleen Bearce appointed successor conservator of the person and estate on 04/05/17, \$80,000 bond.
2. Notice of Death of Conservatee filed 11/08/17 indicates conservatee Jacqueline Bearce passed away on 09/28/17.
3. Declaration by Sherri Kastilahn, appointed counsel, filed 10/04/17. Prior conservator, Robert Bearce (spouse), indicates all assets are community property. **Question need for estate powers? Does Court wish to require a petition to terminate nunc pro tunc as a remedy? JTD.**
4. If not, need pre-death and post-death accountings per Pr. C. §2620; final Inventory and Appraisal; and proof of service Inventory and Appraisal including Instructions for Objections per Pr. C. §2610.

RECOMMENDATION

Need to clear notes 3-4.

(lh)

Future Hearing: 6/13/18: 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 for clarification of the notes only - no legal or procedural advice will be given.

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 01/24/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700275

CASE NAME: MTR OF ALHAM MOHAMAD AWAD

HEARING:
Petition for Appointment of Conservator

COUNSEL:
MANAL M AWAD (CP)...PRO/PER
ALHAM MOHAMAD AWAD (CTP)...SANDRA TURNER

XREF: CONPS1500107 MTR OF ALHAM MOHAMAD AWAD

GENERAL INFORMATION

Continued from 11/01/17 to clear probate notes. Notice to be given by Attorney Sandy Turner.

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

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

1. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Proposed conservatee is developmentally disabled. Report of Counsel Sandy Turner filed 08/03/17.
4. Proposed conservatee is developmentally disabled. IRC report filed 09/28/17.
5. Petitioner seeks medical powers. Capacity Declaration filed 12/11/17.
6. Petitioner and maternal grandmother are not listed in required contacts (Local form SB-12224). **Need** completed form.
7. CI Report filed 08/15/17.
8. Certificate of Completion of the Conservatorship Training Class filed 08/09/17.
9. Return of Citation filed 08/11/17.
10. Notice is complete.
11. ~Proposed Form Order: 08/30/17.

RECOMMENDATION

Need to clear note 6. If approved, set hearing for Compliance Review for **08/29/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lc/lh/lc/lh)

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

DATE: 01/24/18 TIME: 9:30 DEPT: S36P

CASE#: SC SS03156

CASE NAME: MTR OF SHERRIE ANN WILSON

HEARING:
Hearing Re: STATUS/ CI REPORT

COUNSEL:
HENRY C YAHN (CP)...PRO/PER
SHERRIE ANN WILSON (CTP)...EDWARD B FISCHEL

GENERAL INFORMATION
Continued from 01/02/18

THIS CASE IS SET FOR HEARING ON STATUS/ CI REPORT

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

1. Court set matter on 12/22/17 upon review of confidential memo from the Court Investigator. Court appointed Mitchell Roth as counsel for Sherrie Wilson.
2. It came to Court's attention that attorney Edward Fischel represents conservatee. Court relieves Attorney Roth, reappoints Attorney Fischel and sends notice for hearing on 01/24/18.
3. **Need** report of appointed Counsel Edward Fischel

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIP

DATE: 01/24/18 TIME: 8:30 DEPT: S37P

CASE#: CON PS1700327

CASE NAME: JORDAN BURNETT-RAY

HEARING:

Petition for Appointment of Conservator

COUNSEL:

TONYA DENISE RAY (CP)...CRAWFORD & RANSOM APLC
JORDAN BURNETT-RAY (CTP)...CRAIG M PARKER

GENERAL INFORMATION

Continued from 10/11/17. Court deems this petition to be for Limited Conservatorship. Court appointed Tonya Denise Ray as Temporary Conservator. Court will require a report from Inland Regional Center. Clerk's office to notify Inland Regional Center. Attorney Craig M. Parker appointed counsel for Jordan Burnett-Ray.

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

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

1. Petitioner requests powers to make decisions as to educational placement. JTD
2. Petitioner seeks medical powers. Capacity Declaration filed 08/28/17; caption A-C is incomplete as to purpose of form. JTD
3. Proposed conservatee is developmentally disabled.
 - a. **Need report of appointed Counsel Craig M. Parker.**
 - b. **Need IRC report.**
4. Petition is on an outdated form missing ICWA allegations and if a patient in state institution. **Need** verified supplement to include page 4 of updated petition, or file an amended petition using updated form.
5. List of Required Contact Information is missing petitioner Tonya Ray (mother) and Alexandra Ray (sister). **Need** completed form.
6. **Need** Confidential Screening form.
7. **Need** return of Citation.

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

8. Proof of Service of Notice of Hearing filed 10/11/17 is incomplete at item #4a as to date of mailing. Does Court wish to deem date of mailing as of the date of server's signature? **JTD**
9. Proof of Completion of the Conservatorship Training Class filed 10/05/17.
10. CI Report 10/05/17.
11. ~Proposed Form Order: 08/28/17

RECOMMENDATION

Need to clear notes 3-7. If approved, set hearing for Compliance Review for **08/29/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C. §1830(c); Level of Care and Care Plan per Pr.C. §2352.5

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 01/24/18 TIME: 8:30 DEPT: S37P

CASE#: PRO DS1100109

CASE NAME: MARIAN SYMENS

HEARING:

Hearing re Final Discharge

COUNSEL:

JAMES P SYMENS

(PET)...BROWN WHITE & OSBORN

MARIAN SYMENS

(DEC)...

GENERAL INFORMATION

Continued from **05/17/17, 07/19/17 and 09/13/17.**

Continued from 11/08/17 for supplement to be filed. Notice to be given by Mr. Flory.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of James Symens approved on 05/11/16.
2. Receipts filed; however, the receipts do not match distribution. **Need supplement** re possible post-deceased heirs' intestate heirs. Court to clarify who Brenda Osborn, Vincent Osborne and Marcos Rivera are as they do not appear to be listed in distribution order.
3. **Need** Ex Parte Petition for Final Discharge and Order resubmitted.

RECOMMENDATION

Need to clear notes 2-3.

(lc/lh)

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

DATE: 01/24/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400418

CASE NAME: MTR OF JOHN ROBLES

HEARING:

Probate status report filed.

COUNSEL:

NORA R PEREZ	(PET)...TREVOR D MARTIN
JOHN ROBLES	(DEC)...
HELEN IBARRA	(TP)...PRO/PER
JOBEY O'LEARY	(PRISCILLA C SOLARIO)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report of Administration

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

1. Letters Testamentary issued to Nora Perez on 07/03/14.
2. Petitioner alleges the estate is not in a condition to be closed as real and personal property is still being determined by the executor. A complete Inventory and Appraisal will be filed shortly hereafter.
3. Petitioner requests an additional 12 months to close the estate.
4. Notice of Hearing filed 10/02/17 does not comply with Pr.C. § 12201. Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. § 10950. **This form of notice is mandatory. Need proper notice and proof of service as to Basilia Robles, Helen Ibarra, Albert Robles, Priscilla C. Solario, Esq, and J. Patrick Ragan, Esq.**

RECOMMENDATION:

Require notice then Court's discretion. If approved, set next hearing for Accounting Review on **10/03/18**.

(lh)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 01/24/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400937

CASE NAME: Donald B. Evans II

SEE ALSO 5 6

HEARING:

Hearing Re: OSC RE SURCHARGE

COUNSEL:

DONALD B EVANS III (PET)...PRO/PER
DONALD B EVANS II (DEC)...
JOHN W EVANS (PET)...PRO/PER
JESSE L EVANS (PET)...PRO/PER
S.B COUNTY PUBLIC ADMINISTRATOR (PET)...CRAIG M PARKER
DENISE WILLIAMS (TP)...PRO/PER
DANIEL R MORTENSEN (DANIEL R. MORTENSEN)

GENERAL INFORMATION

Continued from 09/14/17 and 11/14/17 for Donald Evans III to be present.

THIS CASE SET FOR HEARING ON OSC re Surcharge.

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

1. OSC set on 06/15/17 when Donald Evans III failed to appear and file an accounting.
2. **Need return of citation for Donald Evans III.**

RECOMMENDATION

Need return of Citation. Court's discretion re OSC.

(lc/nb/lh)

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

DATE: 01/24/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400937

CASE NAME: Donald B. Evans II

SEE ALSO 4 6

HEARING:

Hearing Re: PTN FOR REMOVAL OF REPRESENTATIVE OF ESTATE

COUNSEL:

DONALD B EVANS III (PET)...PRO/PER
DONALD B EVANS II (DEC)...
JOHN W EVANS (PET)...PRO/PER
JESSE L EVANS (PET)...PRO/PER
S.B COUNTY PUBLIC ADMINISTRATOR (PET)...CRAIG M PARKER
DENISE WILLIAMS (TP)...PRO/PER
DANIEL R MORTENSEN (DANIEL R. MORTENSEN)

GENERAL INFORMATION

Continued from 09/28/16 as objection were recently filed.

Continued from 12/15/16. Donald Evans ordered to prepare an accounting which will include exactly why the home was foreclosed upon. Bond ordered of \$100,000.

On 04/13/17 Donald Evans III was suspended as representative of the estate immediately. **Public Administrator appointed.** Clerk's Office to notify Public Administrator. The Court ordered Donald Evans III file an accounting by 5/15/17. If accounting not filed, the court will surcharge Donald Evans III in an amount to be determined. The Court advises John Evans to file an ex parte

Continued from 06/15/17. Donald Evans III cited to appear. Should he fail to appear, bench warrant may be issued. Public Administrator to be present at next hearing and to file order and letters as successor.

Continued from 09/14/17.

Continued from 11/14/17. Donald Evans III is cited to appear at next hearing.

Should he fail to appear, a bench warrant may be issued for his arrest. Court notes that part of this petition is moot as Donald Evans III has been removed as personal representative of the estate and the public administrator has been appointed. Court grants request that Donald Evans III be ordered to turn all receipts/documents/accounts of the estate to the Public Administrator and that he be ordered to file an Inventory and Appraisal and an accounting. Court reserves on the issues of surcharge, reimbursement of costs and attorney fees, reimbursement of embezzled funds, and an independent audit. Court confirms

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

appointment of Public Administrator as successor administrator. Order signed this date.

THIS CASE SET FOR HEARING ON Petition for Removal of Representative of the Estate of Donald Blynn Evans II Per Pr.C. §§ 8500-8502 by John Evans and Jesse Evans.

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

1. The Decedent, Donald Blynn Evans II, died on July 11, 2014. Donald Blynn Evans III was appointed as Personal Representative of the Estate by this Court on December 11, 2014.
2. Petitioners John W. Evans and Jesse L. Evans allege the following acts and breach of duties by the appointed Personal Representative:
 - a. use of Estate funds and accounts for personal purposes and failing to make productive certain assets of the Estate that could be used to generate income, specifically, rents.
 - b. embezzlement of monies belonging to the Estate such as purchases of television sets, household items, personal stereo equipment and other purely personal items.
 - c. mismanagement of the *res* of the Estate by amongst other things failing to pay the mortgage and expenses related to the residence.
 - d. defraud the Estate by false representations.
 - e. failure to provide reasonable information or accountings.
3. Petitioners request and order:
 - a. for an order immediately suspending the powers of the Personal Representative in whole or part.
 - b. in the alternative to suspension of powers, that the Court order the imposition of a surety or bond sufficient to cover any potential losses already occasioned by the wrongful conduct of the Personal Representative as alleged.
 - c. for the removal of the Personal Representative at the earliest possible opportunity.
 - d. for appointment of a duly qualified Personal Representative or Public Administrator in the stead of the now acting Representative.
 - e. for a surcharge.
 - f. for costs.
 - g. for attorney's fees.
 - h. for an order requiring all embezzled funds to be immediately returned to the Estate.
 - i. for an order requiring the Personal Representative to turn over all receipts records, documents, writing or other data relating to the assets or management of the Estate during the time since the Decedent's death.
 - j. for an immediate and current inventory of all property or property interests of the Estate.
 - k. for an immediate accounting.

- l. for an order requiring an independent audit of the activities of the Personal Representative.
 - m. for any and all other relief as the Court may deem appropriate to make the Estate whole for any losses caused to the Estate by the actions of the Personal Representative.
4. Petitioners served the Personal Representative with a citation to appear at the 9/28/16 hearing.
5. **Objections filed by Donald Evans III on 09/27/16. Donald alleges that the house is *not* in foreclosure, the Inventory and Appraisal is filed [10/20/15] and that removal is inappropriate.**
6. **Declaration of No Assets filed by Public Administrator on 12/19/17** alleges real property was sold at trustee sale with no excess proceeds; bank accounts were closed by beneficiary listed on accounts, and whereabouts of personal property is unknown. Trustee Deed attached. [Dec 12/19/17, LFpg3-4].
 - a. **Need petition to terminate for lack of assets per Pr.C. § 12251.**
7. No proposed order. Submit after hearing.
8. **Need return of citation for Donald Evans III.**

RECOMMENDATION:

Need return of citation re Donald Evans III.

Matter is contested. No bonding company to notice.

(bc/lc/nb/lh)

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

DATE: 01/24/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400937

CASE NAME: Donald B. Evans II

SEE ALSO 4 5

HEARING:

Accounting Review

COUNSEL:

DONALD B EVANS III (PET)...PRO/PER
DONALD B EVANS II (DEC)...
JOHN W EVANS (PET)...PRO/PER
JESSE L EVANS (PET)...PRO/PER
S.B COUNTY PUBLIC ADMINISTRATOR (PET)...CRAIG M PARKER
DENISE WILLIAMS (TP)...PRO/PER
DANIEL R MORTENSEN (DANIEL R. MORTENSEN)

GENERAL INFORMATION:

Continued from 7/19/16, 09/28/16 and 12/15/16. Donald Evans ordered to prepare an accounting which will include exactly why the home was foreclosed upon. Bond ordered of \$100,000.

Continued from 04/13/17 and 06/15/17. Donald Evans III cited to appear. Should he fail to appear, bench warrant may be issued.

Continued from 09/14/17 at request of Craig Parker. Notice by Judicial Assistant.

Continued from 11/14/17 for Donald Evans III to be present.

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

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

1. Letters of Administration issued 12/11/14 vacated due to error. Letters of Administration re-issued to Donald Evans III, son, on 11/30/15, full authority, no bond. Bond of \$100,000 ordered on 12/15/16.
2. **Declaration of no assets by Public Administrator filed 12/19/17. Need petition to terminate for lack of assets per Pr. C. §12251.**
3. **Need** accounting or status report.
4. **Need** bond.
5. **Need return of citation for Donald Evans III.**
6. Notice of Proposed Action filed on 9/9/16. **Objection to NOPA by John Evans filed 9/21/16.**

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

RECOMMENDATION:
Inquire status.

(nb/sa/lc/nb/lh)

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

DATE: 01/24/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500929

CASE NAME: Beatriz G. Huete

HEARING:
Hearing re Final Discharge

COUNSEL:
BRIDGETTE HUETE (PET)...JEANNE E KENNEDY
BEATRIZ G. HUETE (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge of Administrator Bridgette Huete, daughter

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

1. Need receipts from Bridgette Huete, Eddie Huete, Carlos G. Huete, and Luis Huete.
2. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.
(lh)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 01/24/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600728

CASE NAME: MTR OF CHARLES NEIL LITTLEWOOD

HEARING:
Accounting Review

COUNSEL:
SHELLEY LITTLEWOOD (PET)...PRO/PER
CHARLES NEIL LITTLEWOOD (DEC)...
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP)...

Waiver of Court Fees and Costs filed by SHELLEY LITTLEWOOD is GRANTED

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review of Administrator Shelley Littlewood

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

1. Letters of Administration issued to Shelley Littlewood on 11/15/16 with full authority and no bond.
2. **Need** final Inventory and Appraisal with supporting financial statements per Local Rule 20-908.
3. No accounting or status report of administration. Need same.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/24/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600907

CASE NAME: MTR OF YOUNG SOOK HAN

HEARING:

Petition for (SECOND AMENDED) LETTERS OF ADMINISTRATION W/FULL
IAEA

COUNSEL:

AE SOOK HAN	(PET)...RYAN A ELLIS
YOUNG SOOK HAN	(DEC)...
YOUNG SOO KO	(PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON ANCILLARY Petition for Letters of Administration with full authority under IAEA by Ae Sook Han to appoint Youn Soo Ko (brother-in-law)

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

1. All heirs waive bond; however bond waivers are not dated at signatures. Estimated net value of estate is \$25,000, real property only. Court also has discretion to require bond per Pr. C. § 8481(b). JTD
2. Duties and Liabilities filed 06/13/17; however, form is missing telephone number and is not dated at signature. JTD
3. ~Proposed form Order: 06/13/17

RECOMMENDATION:

Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **04/03/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 01/24/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601028

CASE NAME: BRINKSMA FAMILY TRUST

SEE ALSO 16

VACATED

HEARING:

TRUSTEE'S FIRST ACCOUNT AND REPORT Account and Report of MARK SYDNEY BRINKSMA and Petition for allowance of fees filed.

COUNSEL:

SUSAN ANN BRINKSMA (PET)...NEIL J DE LEON
BRINKSMA FAMILY TRUST (TRU)...
MARK SYDNEY BRINKSMA (PET/OBJ)...COPENBARGER & COPENBARGER

GENERAL INFORMATION

Continued from 10/04/17. Court orders supplement including back up documentation to be filed. Parties are ordered to meet and confer prior to next hearing. Susan Brinksma ordered to be physically present at next mediation hearing. Notice to be given by Mr. Anderson.

THIS CASE SET FOR HEARING ON 1st Account of Trustee Mark Brinksma, son.

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

1. Accounting period 01/22/15 – 05/31/17.
2. Assets on hand \$142,046.53; cash and personal property.
3. Trustee seeks fees of \$20,400 for 3 hours per week at \$50 per hour of which \$7,350 has been paid with a remaining request of \$13,050. Court may wish to require an itemization. JTD
4. Trustee made preliminary distribution to himself and other beneficiary Susan Brinksma, daughter, for \$275,544.59 each.
5. Summary of Account reflects "receipts" for two loans for house repairs; however, a loan is a change in form of assets and should be reflected as such on a separate schedule [Acct. 07/13 LFpg10]. **Need corrected accounting to include a Change in the Form of Assets schedule, and a revised Summary of Account. See Pr. C. §16063(b); Pr. C. §1063(g). Note: Supp. filed 10/03/17 providing receipt for loan repayment does not clear note but should also be reflected Change in Form of Assets schedule.**

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

6. **Objection to Trustee's First Accounting by Susan Ann Brinksma filed 09/28/17.**
7. No proposed order. Submit after hearing.

RECOMMENDATION

Need to clear note #5. "*If*" ***court retains jurisdiction***, set next Accounting review for **09/12/18**. Matter is contested.

(lc/lh)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 01/24/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601239

CASE NAME: JEFFERY P DURBIN

HEARING:

WAIVER OF Account and Report of BRUNHILDE EWING and Petition for allowance of fees filed.

COUNSEL:

BRUNHILDE EWING (PET)...GREGORY L ZUMBRUNN
JEFFERY P DURBIN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Waiver of Account and Report and Petition for Fees by Brunhilde Ewing, administrator/sole beneficiary

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

1. Assets on hand: \$84,525.66
2. Petitioner waives statutory compensation.
3. Attorney requests statutory fees of \$10,000.45. Calculated.
4. Assignment and Waiver of Interest signed by Robert Schaefer, brother/sole intestate heir.
5. Inventory and Appraisal filed 08/07/17 includes attached Bank of America IRA account with a DOD balance of \$21,690.34; however, the account is not included in the inventory.
 - a. Question if the account has a named beneficiary? **Need verified supplement.**
 - b. Attachment 1 includes a Voya retirement account valued at \$933.97 which is missing account number. **Need corrected Inventory and Appraisal.**
 - c. **Need Voya financial statement to support balance at date of death per Local Rule 20-908 via verified supplement.**
6. ~Proposed order: 09/27/17

RECOMMENDATION:

Need to clear note #5, then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **01/30/19**. (lh)

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

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 01/24/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701237

CASE NAME: MTR OF PRISCILLA JEAN BANKS

HEARING:

Petition to determine succession to Real Property

COUNSEL:

ROBERTA A USHER

(PET)...THOMAS W DOMINICK

ROBERT BANKS JR

(PET)...THOMAS W DOMINICK

PRISCILLA JEAN BANKS

(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Roberta A. Usher and Robert Banks, Jr .

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

1. Petitioners, Roberta A. Usher (daughter) and Roberts Banks, Jr (son) seek 100% interest, 50% each; in decedent's real property per intestate succession.
2. ~Proposed Form Order: 12/12/17

RECOMMENDATION

Court's discretion.

(lh)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 01/24/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701249

CASE NAME: THE GRETA L. TOLIVER TRUST DATED 11/30/1995

HEARING:

Petition for Confirmation of Trust ownership of personal property

COUNSEL:

THE GRETA L. TOLIVER TRUST (TRU)...

LINDA LEW HEWISH (TEE)...PRO/PER

Waiver of Court Fees and Costs filed by LINDA LEW HEWISH is GRANTED

Currently under review by Legal Research

(LR)

Need Notice of Hearing as to trustee Linda Lew Hewish (daughter), Adam L. Barenfeld (son), Edward Toliver and Bobby Toliver (named beneficiaries in trust). **Note: Notice filed 01/19/18 not in LF at time of 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 for clarification of the notes only - no legal or procedural advice will be given.

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 01/24/18 TIME: 8:30 DEPT: S37P

CASE#: SPR SS04008

CASE NAME: ESTATE OF BOBBY P. MAC LACHLAN

SEE ALSO 15

HEARING:

SIXTEENTH Account and Report of DOROTHY N. KINSEY and Petition
for allowance of fees filed.

COUNSEL:

DOROTHY N. KINSEY (PET/TEE)...HORSPPOOL & HORSPPOOL
BOBBY P. MAC LACHLAN (DEC)...

XREF: SPRSS57143 MTR OF DONNELL FRANK MACLACHLAN TRUST

GENERAL INFORMATION

Continued from 11/14/17. Trust document filed in Court. Court approves attorney fee request in the amount of \$1,545.50. Hearing continued at request of Court to clear probate notes/file verified supplement. Court reserves issue of removing trust from Court jurisdiction and on issue of bond.

THIS CASE IS SET FOR HEARING ON Sixteenth Account Current; Petition for Fees and Petition to Remove Trust from Continuing Court Jurisdiction by Trustee, Dorothy Kinsey ["Petitioner"]. [Pr. C. §§17500(5), 17350 et seq.]

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

1. Accounting period 01/01/16 to 12/31/16.
2. Assets on Hand \$253,538.15 consisting of \$8,748.67 in cash and remaining in annuities and certificate of deposit.
3. No bond.
4. Petitioner requests compensation of \$2,000.00 as trustee fees. Need verified supplement with computation as to how the fee amount is determined and itemization of same. **Supp 11/20/17 alleges requested fee is reasonable as trustee has routinely been approved compensation in the amount of \$2,000 calculated based on .7% percent of trust estate. JTD**
5. Attorney requests fees of \$1,540.50 billed at \$395/hour for 3.9 hours attorney time. Itemized [LF, p. 27].
6. Petitioner requests that the Court grant an order removing the Trust from continuing court jurisdiction due to the size of the trust; and indicates all current

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

and remainder beneficiaries have consented to the removal of the Trust from continuing court jurisdiction. Waivers affixed [LF, pgs. 28-31]. JTD.

7. ~Proposed Order 11/20/17

RECOMMENDATION:

Court's discretion re: fees, bond and trust termination. If approved, set hearing re next Accounting Review for **03/01/18**. Account to be filed 30 days' in advance of hearing.

(nb/lh)

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

DATE: 01/24/18 TIME: 8:30 DEPT: S37P

CASE#: SPR SS57143

CASE NAME: MTTR OF DONNELL FRANK MACLACHLAN TRUST

SEE ALSO 14

HEARING:

TWENTY-SEVENTH Account and Report of DOROTHY KINSEY and Petition for allowance of fees filed.

COUNSEL:

DONNELL FRANK MACLACHLAN (DEC)...
BOBBY P. MAC LACHLAN (CEP)...ROBERT C CHANDLER
DOROTHY KINSEY (CPE/STE)...HORSPOOL & HORSPOOL
DONNELL FRANK MACLACHLAN TRUST (TRU)...

XREF: SPRSS04008 ESTATE OF BOBBY P. MAC LACHLAN

GENERAL INFORMATION

Continued from 11/14/17. Trust document filed in Court. Court approves attorney fees in the amount of \$1,817. Hearing continued at request of Court to clear probate notes/file verified supplement. Court reserves on the issue of removing trust from Court supervision and requiring a bond.

THIS CASE IS SET FOR HEARING ON Twenty-Seventh Account Current; Petition for Fees; and Petition to Remove Trust from Continuing Court Jurisdiction by Successor Trustee, Dorothy Kinsey ["Petitioner"]. [Pr. C. §§17500(5), 17350 et seq.]

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

1. Accounting period 01/01/16 – 12/31/16.
2. Assets on Hand \$291,738.24 consisting of \$1,258.17 in cash and remaining in annuities.
3. **Prayer does not request trust to be removed from continuing court jurisdiction. Supp 11/20/17 prayer, item 5 prays for all other and further orders the Court deems necessary. Thus, is requests the Court also issue its Order that Trust be removed as requested in proposed Order. JTD.**
4. Petitioner requests compensation of \$2,000.00 as trustee fees. Not itemized; need computation as to how the fee amount is determined and itemization of same. **Supp 11/20/17 alleges requested fee is reasonable as trustee has**

routinely been approved compensation in the amount of \$2,000 calculated based on .6% percent of trust estate. JTD

5. Attorney requests fees of \$1,817.00 for 4.60 attorney hours at \$395/hour. Itemized [LF p. 25]. JTD
6. Petitioner requests that the Court grant an order removing the Trust from continuing court jurisdiction due to the size of the trust; and indicates all current and remainder beneficiaries have consented to the removal of the Trust from continuing court jurisdiction. Waivers affixed [LF, pgs. 28-31]. JTD.
7. Proposed Order 11/20/17 total assets on hand are miscalculated and do not match accounting.

RECOMMENDATION:

Court's discretion. If approved, set hearing re: next Accounting Review for **03/01/18**. Account to be filed 30 days' in advance of hearing.

(nb/lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 01/24/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1601028

CASE NAME: BRINKSMA FAMILY TRUST

SEE ALSO 10

VACATED

HEARING:

Trial Setting Conference

COUNSEL:

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

BRINKSMA FAMILY TRUST (TRU)...

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

TSC—no notes—JTD

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

DATE: 01/24/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1601107

CASE NAME: JACK E BIRKINSHAW TRUST OF 2009,DATED MARCH 12,200

HEARING:

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

COUNSEL:

ERLINDA CAMERON	(PET)...ROBERT F SCHAUER
JACK E BIRKINSHAW TRUST	(TRU)...
ISRAEL GARCIA	(OBJ)...SERGIO A WHITE

XREF: CIVDS1413193 CAMERON -V- GARCIA, ET AL

Currently under review by Legal Research.

(LR)

Continued matter. Notice not re-reviewed.

Future Hearings: 1/25/18: Trial Setting Conference, Hearing Re: OSC Re: Sanctions

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

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 01/24/18 TIME: 9:30 DEPT: S37P

CASE#: BC BS00032

CASE NAME: IN THE CONSERVATORSHIP OF MARK STOTT

HEARING:

Hearing re Final Discharge

COUNSEL:

MARK DAVIDSON STOTT	(CEP)...MITCHELL I ROTH
LINDA M LINGREN	(PLA/CPE)...CALDWELL, KENNEDY & PORTER, A.
LAWRENCE ALF	(PET)...PRO/PER
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
DAVID SPASOJEVICH	(SC/CPE)...ROBERTA L. TAYLOR & ASSOCIATES
CARMELA SPASOJEVICH	(SC/CPE)...ROBERTA L. TAYLOR & ASSOCIATES
JAMES M. OWEN	(SC)...PRO/PER
MARK DAVIDSON STOTT	(CEE)...MITCHELL I ROTH

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge of Co-Conservators David and Carmela Spasojevich

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

1. **Need** receipt from Public Guardian, successor conservator.
2. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.

(lh)

Future Hearings: 3/19/18: Report of Sale & Petition for Order to Confirm Sale of Real Property

4/16/18: 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 for clarification of the notes only - **no legal or procedural advice will be given.**

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

DATE: 01/24/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1100151

CASE NAME: STEVEN BURNICE MOORE

HEARING:

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

COUNSEL:

LYLE STOTELMYRE	(CE/CPE)...M DANIEL SAYLOR
STEVEN BURNICE MOORE	(CTE/CEP)...
MICHELLE VANCE	(CP)...EDWARD B FISCHER & ASSOC
STEVEN MOORE	(PET)...BRYAN C. HARTNELL
BRYAN C HARTNELL	(PET)...BRYAN C HARTNELL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 6th Account Current and Petition for Fees by Lyle Stotelmyre.

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

1. Account period covers 11/01/16 to 10/31/17
2. Assets on hand \$85,968.64, cash.
3. Petitioner requests fees of **\$4,773** billed at varying rates of \$75-\$110/hour for 45.3 hours. Itemized [12/13/17, Accounting LF pg. 14-21]. JTD
4. Attorney requests fees of **\$3,518.75** billed for attorney at \$375/hour and paralegal at \$125/hour for a total of 17.05 hours. Itemized [01/11/17 Accounting LF p.23]. JTD
5. Current bond: \$105,000. Appears sufficient.
6. Notice is complete.
7. ~Proposed order: 12/13/17

RECOMMENDATION

Court's discretion. If approved, set hearing on the next accounting review for **01/16/19** (if one year) or **01/15/20** (if two years). Accounting to be filed 30 days in advance.
(lh)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 01/24/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1200043

CASE NAME: MTR OF PAUL RICHARD BRISTOW JR

HEARING:

Fourth Account and Report of JAIMEE A KINER and Petition for allowance of fees filed.

COUNSEL:

JAIMEE A KINER (CPE)...CALDWELL, KENNEDY & PORTER
PAUL RICHARD BRISTOW JR (CEP)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 4th Account Current of SNT and Petition for Fees of Jaimee Kiner, Trustee.

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

1. Accounting period covers 11/01/16 to 10/31/17. Note: accounting period lapses one day.
2. Assets on hand \$29,688.32, cash
3. Petitioner waives compensation.
4. Attorney requests fees of \$3,240 at \$150/300 per hour, for 13.4 hours plus an additional estimated 3 hours to give notice, prepare order, and attend hearing for paralegal and attorney services. Itemized. [Acct, 12/06/17, LFpg18/19].
5. **Need** verification by petitioner/ trustee Jaimee A. Kiner.
6. Notice is complete.
7. Proposed Order 12/06/17 assets on hand do not match accounting. Need corrected Order.

RECOMMENDATION:

Need to clear note #5, then Court's discretion. If approved, set hearing re next Accounting Review re SNT for **01/06/19 (if one year) or 01/05/20 (if two years)**.
(lh)

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

DATE: 01/24/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1300276

CASE NAME: Marie Monnell Miller

HEARING:

Hearing Re: PETITION TO DISPENSE WITH (FINAL) ACCOUNTING

COUNSEL:

GAYLE M RITTER (CPE)...HARTNELL LAW GROUP
MARIE MONNELL MILLER (CEP)...
MARY ANN IANDIORIO (TP)...PRO/PER

XREF: CONPS1300277 MARY E SHEDDEN

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition to Dispense with Final Accounting by Gayle M. Ritter, conservator of person and estate

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

1. Matter set by clerk's office on 12/18/17 per attorney on demand.
2. Notice of Conservatee's Death filed 11/09/17. Conservatee passed away on 04/01/17.
3. Order waiving 2nd Account current for period ending 11/13/16, with \$0.00 on hand, was approved on 02/17/17.
4. Petitioner requests Court dispense with 3rd and Final Account under Pr. C. §2628 as the estate the property on hand at beginning and end of accounting period is \$0. JTD

RECOMMENDATION

Court's discretion.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 01/24/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400227

CASE NAME: Presciliano E. Castillo

HEARING:
Accounting Review

COUNSEL:
MARIA D CASTILLO (PCR)...PRO/PER
PRESCILIANO E CASTILLO (PCE)...DUANE P BOOTH

Waiver of Court Fees and Costs filed by MARIA D CASTILLO is GRANTED

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Maria Castillo

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

1. Order to Dispense with First Account entered 11/24/15 for period ending 10/16/15.
2. Second Account Current or Waiver of Accounting now due.

RECOMMENDATION

Inquire status.
(lh)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 01/24/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700458

CASE NAME: MTR OF ANDREW JOSEPH GARCIA

HEARING:
Petition for Appointment of Conservator

COUNSEL:
LAURA GARCIA (CP)...PRO/PER
ANDREW JOSEPH GARCIA (CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Laura Garcia, daughter

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

1. Petitioner seeks medical powers. Capacity Declaration filed 12/15/17; however, caption is incomplete at item B purpose of form as to whether proposed conservatee has capacity to give medical consent; item #4 as to whether proposed conservatee is a patient; and item #6 evaluation of mental functions.
Need completed form.
2. **Need** Notice of Hearing and Proof of Service as to Sarisa Harker (granddaughter).
3. List of required contacts is missing granddaughters, Zariah and Sarisa Harker.
Need completed form.
4. **Need** Certificate of Completion of the Conservatorship Training Class.
5. **CI report filed 01/10/18.**
6. Return of Citation filed 01/03/18.
7. ~Proposed Form Order: 12/15/17

RECOMMENDATION

Need to clear notes 1-4. If approved, set hearing for Compliance Review for **08/29/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5 (lh)

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