



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 02/13/18**

The notes on the following pages were updated approximately three court days prior to the hearing to reflect newly-filed documents. Documents filed now after that update typically will not be reviewed except on the date of hearing at the judge's discretion.

### **Destruction of Filed Documents:**

Shredding/destruction of all court documents filed and imaged before January 2011 will begin soon. All filed/imaged documents are shredded one year after filing pursuant to court policy. Any filed original documents not retrieved timely will be permanently lost. (Wills and codicils lodged into the will vault will not be affected.)

### **Contacting the Probate Examiners:**

Probate Examiners' email address: [ProbateNotes@sb-court.org](mailto:ProbateNotes@sb-court.org)

Emails must have the case identification information and hearing time/date in the subject line. No attachments will be opened. Probate Examiners can only respond to inquiries regarding the meaning of comments in the notes. Please do not email to notify that documents have been filed, to request a confirmation whether documents have been received, or to request the clearing of notes. No legal or procedural advice may be given by examiners in response to your email.

nb0125/0207

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PROBATE**

-----  
DATE: 02/13/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1600453

CASE NAME: ROBERT W REDFEARN

HEARING:

Hearing re Final Discharge

COUNSEL:

CHADD C REDFEARN                      (PET)...MARIELLEN ROSS  
ROBERT W REDFEARN                    (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Approving Waiver of Accounting entered 04/10/17.
2. **Notice of Non-Payment by Probate Referee filed 01/19/18.**
3. Need Ex-Parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 02/13/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600472

CASE NAME: ESTATE OF GARY DEE PINKERTON

HEARING:

Probate status report filed.

COUNSEL:

GARY DEE PINKERTON (DEC)...  
LEE JAY PINKERTON (PET)...KEVIN M MAHAN

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report [filed 11/13/17] by Executor, Lee Jay Pinkerton ["Petitioner"].

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

1. Need final inventory and appraisal.
2. Need verification signed by the personal representative.
3. Petitioner alleges the estate is not in a condition to be closed as it is unknown and undetermined if a federal estate tax return will be required. Petitioner indicates he will be meeting and conferring with a tax professional after 01/02/18.
4. Petitioner does not request a specific time to close the estate. Suggest 12 months. JTD.
5. 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:

Need to clear notes 1-2 & 5 then Court's discretion. If approved, set next hearing for Accounting Review on **11/13/17**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.

(nb)

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

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 02/13/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601072

CASE NAME: POPPY ANN WALKER SEPARATE PROPERTY TRUST

**SEE ALSO 12**

HEARING:

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

COUNSEL:

|                              |                               |
|------------------------------|-------------------------------|
| JAY JAY HENDERSON            | (OBJ)...THE GROSSMANLAW FIRM, |
| JAY JAY HENDERSON            | (PET)...THE GROSSMAN LAW FIRM |
| MICHAEL WALKER               | (PET)...GAUDY LAW, INC        |
| POPPY ANN WALKER TRUST DATED | (TRU)...                      |

GENERAL INFORMATION:

**Continued from 10/24/17. Counsel for Michael Walker to file by 4pm January 9, 2018, supplements to clear the probate notes.**

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Successor Trustee, Michael Walker ["Petitioner"] aka Michael Ray Walker, Sr.

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

1. Accounting period 02/22/16 to 12/27/16.
2. Assets on Hand \$0.00. Prior assets on hand in the amount of \$278,498.76 distributed to petitioner per fourth amendment to the trust [LF, p. 40]
3. Petitioner requests ratification for reimbursement of costs advanced of \$22,507.20. Itemized [LF, p.62].
4. Compensation or fees are not requested.
5. No proposed order. Submit Order after Hearing.
6. **Objections filed 09/22/17 by Jay Jay Henderson.**

RECOMMENDATION:

Set for contested hearing.

(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 02/13/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700343

CASE NAME: MTR OF PAMELA SUE WATKINS

HEARING:

Waiver of Account and Report of JODI RENE JOHNSON and Petition for allowance of fees filed.

COUNSEL:

JODI RENE JOHNSON (PET)...DARLING LAW OFFICES  
PAMELA SUE WATKINS (DEC)...

GENERAL INFORMATION:

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

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

1. Assets on Hand \$136,376.61 in cash.
2. Heirs waive accounting.
3. Petitioner waives statutory compensation.
4. Attorney requests statutory fees of \$5,470.00. Calculated.
5. Petitioner does not request a reserve.
6. Proposed order 01/29/18 received. Submit Order after Hearing.

RECOMMENDATION

Court's discretion. If approved, set next hearing for receipts and final discharge for **02/19/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 02/13/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1700592

CASE NAME: MTR OF MOHAMMAED A. QAVI

HEARING:

Petition for ORDER AUTH PARTICULAR TRANSACTIONS TRANSFERRING  
ASSESTS

COUNSEL:

MOHAMMED A. QAVI

(RES)...EDWARD B FISCHER

PATRICIA A. QAVI

(PET)...ELDER CARE LAW, CALIFORNIA

Currently under review by Legal Research.  
(LR)

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

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 02/13/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1701073

CASE NAME: JUAN CARLOS CABALLERO

HEARING:

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

COUNSEL:

CRISTINA KALBERMATTER (PET)...DARLING LAW OFFICES  
JUAN CARLOS CABALLERO (DEC)...

GENERAL INFORMATION:

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

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

1. Petition alleges she is the sole heir and waives bond. Estimated estate valued at \$61,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
2. Proof of publication filed. However, publication erroneously indicates this is the estate of petitioner. Need proper publication.
3. No proposed order/letters. Submit after Hearing.

RECOMMENDATION:

Need to clear note 2 then Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **04/23/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

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DATE: 02/13/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1701162

CASE NAME: RANDY JOE HEINRICHS

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL IAEA

COUNSEL:

JENNIPHER BALK (PET)...MATTHEW M O'LEARY  
RANDY JOE HEINRICHS (DEC)...

GENERAL INFORMATION:

**Continued from 12/26/17. Tiffany Atkin states she objects to this petition. Complete, written objections to be served and filed by 01/23/18 or they will be waived permanently. Tiffany Atkin states she understands the court's admonishment re filing of objections by deadline and consequence for failure to comply. Court clarifies objections not to be in narrative form.**

THIS CASE IS SET FOR HEARING ON

Petition #1: Petition for Letters of Administration with full authority under IAEA by daughter, Jennipher Balk ["Petitioner"].

Petition #2: Petition for Letters of Administration with full authority under IAEA by step-daughter, Tiffany Atkin ["Petitioner"].

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

Petition # 1 by Jennipher:

1. Petitioner requests bond in the sum of \$255,000. Appears sufficient.
2. Section 5b does not indicate Decedent was survived by stepchild. Need verified supplement.
3. Attachment 8 does not include Tiffany. Need verified supplement.
4. ~Proposed Form Order/Letters 11/14/17.
5. **Objections with supporting documentation, filed by Tiffany Atkin, is not verified or served. Need verification ["signed under penalty of perjury under the laws of the State of California"] and proof of service.**

Petition #2 by Tiffany:

1. Need receipt for "lodging" of original, holographic will.

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



2. Purported will is holographic. Need typed copy of this document and Proof of Holographic Instrument.
3. The purported holographic will is not signed by decedent. Suggest Court to require points and authorities as to the validity of decedent's purported Will as it was not signed by decedent or witnessed. JTD.
4. Petition indicates all beneficiaries waive bond on this estate valued at \$255,000. However, purported will does not include petitioner who is alleging to be a petitioner. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. §8481(b).
5. Section 8 to petition does not include Antonio Gonzalez or Brittney Atkin, named in the will. Need verified supplement.
6. Petition includes a copy of a trust questionnaire [LF, p.9] signed by decedent; an unsigned copy of a trust [LF, pgs. 20-31] reflecting decedent's intent [LF, pgs. 23-24]; and indicating a will and trust documents were prepared [LF, p. 19].
7. Copy of unsigned, prepared will; powers of attorney (general and medical); declaration by daughter, Kimberly Heinrichs (Dunton) [LF, p. 57] declining to act as executor; supporting declarations in favor of petitioner; and copies of criminal history as to Jennipher, affixed to objections filed 01/23/18 [LF, pgs. 24-93].
8. Need proof of publication.
9. Need Notice of Petition to Administer Estate with proof of service.
10. ~Proposed Form Order/Letters 01/23/18.

RECOMMENDATION: Set for contested hearing.

Need to clear notes then Court's discretion. If approved, set future hearing for Accounting/Status Review on **04/23/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 02/13/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1701301

CASE NAME: ESTATE OF MARK NEWTON DAVIS

HEARING:

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

COUNSEL:

JEFFREY CONVERSE (PET)... MARY M. BADER  
MARK NEWTON DAVIS (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by named Executor Jeffrey Converse ["Petitioner"-trustee].

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

1. Petitioner resided in Placentia, CA. Venue should be Orange County per Pr. C. §7051.
2. Attachment 8 to petition does not include Pastor Larry Harris, named in decedent's Will or Danny Smart, Joshua Converse, Caleb Convers, Edwin C. Davis named on proof of service. Need verified supplement.
3. Notice filed on 01/10/18 is the wrong type of notice. Need Notice of Petition to Administer Estate with proof of service to include Pastor Larry Harris.
4. Will waives bond. Estimated value of estate \$279,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
5. The will conditionally incorporates decedent's Trust. Need a certification of trust that meets the requirements in Pr.C. §18100.5.
6. Need proof of publication.

RECOMMENDATION: Deny.

Need to clear notes. If approved, set future hearing for Accounting/Status Review on **04/23/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 02/13/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800003

CASE NAME: KAREN S. FISHER

HEARING:

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

COUNSEL:

KAREN S. FISHER (DEC)...  
ROGER FISHER (PET)...PRO/PER

GENERAL INFORMATION:

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

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

1. Petitioner waives bond. Need Mandatory Waivers of Bond by Heir or Beneficiary, form DE-142/DE-111 by John Dyess.
2. Estimated estate valued at \$203,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
3. Need proof of publication.
4. Need Notice of Petition to Administer Estate with proof of service.
5. ~Proposed Form Order/Letters 01/02/18.

RECOMMENDATION:

Need to clear notes 1, 3-4 then Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **04/23/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino  
Page: 9A ADD ON  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 02/13/18 TIME: 8:30 DEPT: S35P  
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CASE#: TRU PS1800010

CASE NAME: THE BRUCE A BACON FAMILY TRUST

HEARING:  
PROBATE/CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:  
BRUCE A. BACON FAMILY TRUST (TRU)...  
GERARD KIEMENEY (PET)...HARTNELL LAW GROUP  
JANET FRYER (PET)...KEYSTONE LAW GROUP  
PENNY GESLIN (OBJ)...SCOTT GROSSMAN

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Transfer in from Orange County

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

1. Petition for Order Instructing Trustee Regarding the Construction of Trust Instrument, Ascertain Beneficiaries and Modification of Trust Instrument filed in Orange County on 05/19/17, by Petitioner/Successor Trustee Gerard Kiemeney, indicates the principal place of administration of the trust is in Orange County. Court to confirm proper venue.
2. **Objection to Petition for Order Instructing Trustee et seq. filed by Objector, Penny Geslin on 07/13/17.**
3. **Response to Petition for Order Instructing Trustee filed by Respondent, Janet Fryer on 07/21/17.**

RECOMMENDATION:

Petition was not adjudicated prior to transfer. Set for contested hearing.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

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DATE: 02/13/18 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1500303

CASE NAME: the Restatement of the Army (SIC) Troy Isom etc

**SEE ALSO 11**

HEARING:

Hearing Re: PROBATE MANAGEMENT CONFERENCE

COUNSEL:

|  |                            |
|--|----------------------------|
| CAMERON TROY ISOM                      | (APP)... JOHN BELCHER      |
| CAMERON TROY ISOM                      | (PET)... JOHN BELCHER      |
| CAMERON TROY ISOM                      | (PET)...PETER M BOCHNEWICH |
| DARCI SUZANNE ISOM                     | (APP).. JOHN BELCHER       |
| DARCI SUZANNE ISOM                     | (PET)... JOHN BELCHER      |
| DARCI SUZANNE ISOM                     | (PRO/PER                   |
| MISCHELYNN SCARLATELLI                 | (PET)...DANIEL E. KATZ     |
| MISCHELYNN SCARLATELLI                 | (REID & HELLYER            |
| SHIRLEY ANN ISOM                       | (DEC)...)                  |
| THE RESTATEMENT OF THE ARMY (S(TRU)... |                            |
| VICTORIA JO ISOM TAYLOR                | (APP)... JOHN BELCHER      |
| VICTORIA JO ISOM TAYLOR                | (PET)... JOHN BELCHER      |
| VICTORIA JO ISOM TAYLOR                | (PET)...PETER M BOCHNEWICH |

**CCP170.6 filed as to Judge DAVID COHN, case reassigned to Judge JANET M FRANGIE for all purposes.**

**XREF: PROPS1601210** ( Armie Troy Isom)

GENERAL INFORMATION:

**Continued from 02/21/17** at request of counsel. Attorney Nicolas W. Song represents he intends to file a substitution of attorney. Counsel represent judgment is currently pending from Judge Foster's ruling in the civil matter. The Court vacates the Petition currently set on 3-22-17 and re-sets the Petition to 8-15-17. Notice given by Daniel E. Katz.

**Re-set on 08/14/17. Court in receipt of stipulation to continue hearing and order thereon requesting a continuance from August 15, 2017 which the court grants and resets. Notice by Judicial Assistant.**

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

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

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

1. Stipulation and Order for Transfer and Consolidation of Matters entered 05/06/16.
2. **Petitioners' Objections to Tentative Decision filed 01/25/17 by Cameron T. Isom and Victoria J. Isom Taylor.**
3. Darci Suzanne Isom's verified Joinder to Petitioner's Objections to Tentative Decision filed 01/27/17.
4. Reply to Petitioners' Objections to Statement of Decision filed 01/27/17 by Respondent, Mischelynn Scarlatelli.
5. Proposed Order 08/07/17

RECOMMENDATION:

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 02/13/18 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1500303

CASE NAME: the Restatement of the Army (SIC) Troy Isom etc  
**SEE ALSO 10**

HEARING:

Hearing Re: PTN FOR ORDER REQUIRING M.SCARLATELLI, ETC

COUNSEL:

|  |                            |
|--|----------------------------|
| CAMERON TROY ISOM                      | (APP)... JOHN BELCHER      |
| CAMERON TROY ISOM                      | (PET)... JOHN BELCHER      |
| CAMERON TROY ISOM                      | (PET)...PETER M BOCHNEWICH |
| DARCI SUZANNE ISOM                     | (APP).. JOHN BELCHER       |
| DARCI SUZANNE ISOM                     | (PET)... JOHN BELCHER      |
| DARCI SUZANNE ISOM                     | (PRO/PER                   |
| MISCHELYNN SCARLATELLI                 | (PET)...DANIEL E. KATZ     |
| MISCHELYNN SCARLATELLI                 | (REID & HELLYER            |
| SHIRLEY ANN ISOM                       | (DEC)...)                  |
| THE RESTATEMENT OF THE ARMY (S(TRU)... |                            |
| VICTORIA JO ISOM TAYLOR                | (APP)... JOHN BELCHER      |
| VICTORIA JO ISOM TAYLOR                | (PET)... JOHN BELCHER      |
| VICTORIA JO ISOM TAYLOR                | (PET)...PETER M BOCHNEWICH |

**CCP170.6 filed as to Judge DAVID COHN, case reassigned to Judge JANET M FRANGIE for all purposes.**

**XREF: PROPS1601210** ( Armie Troy Isom)

Currently under review by Legal Research.  
(LR)

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

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

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 02/13/18 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1601072

CASE NAME: POPPY ANN WALKER SEPARATE PROPERTY TRUST

**SEE ALSO 3**

HEARING:

Hearing Re: TRIAL SETTING CONFERENCE/ISSUES OF DMGS/SURCHARGE

COUNSEL:

|                              |                               |
|------------------------------|-------------------------------|
| JAY JAY HENDERSON            | (OBJ)...THE GROSSMANLAW FIRM, |
| JAY JAY HENDERSON            | (PET)...THE GROSSMAN LAW FIRM |
| MICHAEL WALKER               | (PET)...GAUDY LAW, INC        |
| POPPY ANN WALKER TRUST DATED | (TRU)...                      |

No notes – TSC.  
(nb)



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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 02/13/18 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1601210

CASE NAME: ARMIE TROY ISOM

HEARING:

Hearing Re: PROBATE MANAGEMENT CONFERENCE

COUNSEL:

|                                |                                |
|--------------------------------|--------------------------------|
| ARMIE TROY ISOM                | (DEC)...                       |
| CAMERON TROY ISOM              | (OBJ)... JOHN BELCHER          |
| DARCI SUZANNE ISOM             | (JOHN BELCHER                  |
| LOS ANGELES COUNTY SHERIFF'S D | (PET)...LAWRENCE BEACH ALLEN & |
| MICHELYNN SCARLATELLI          | (PET)...DANIEL E. KATZ         |
| VICTORIA JO ISOM TAYLOR        | (JOHN BELCHER                  |

**XREF: PROPS1500303** (the restatement of the Army (SIC) Troy Isom etc)

GENERAL INFORMATION

**Continued from 03/22/17**, wherein, the Court ordered this case to be coordinated with PROPS1500303 and to be heard with related case.

**Re-set on 08/14/17. Court in receipt of stipulation to continue hearing and order thereon requesting a continuance from August 15, 2017 which the court grants and resets. Notice by Judicial Assistant.**

THIS CASE SET FOR HEARING ON Case Management Conference.

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

1. Probate of will filed by Mischelynn Scarlatelli, stepdaughter/Trustee, on 06/23/15 in Los Angeles County. Letters of Special Administration issued 06/23/15. General petition does not appear to be granted as matter is contested.
2. Matter transferred to San Bernardino on 11/30/16.

RECOMMENDATION

Court to set matter for Probate of Will by Mischelynn Scarlatelli on calendar on next available date.

(lc/nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIPS**

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DATE: 02/13/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1500332

CASE NAME: ANITA POIRIER

HEARING:

Motion Re: to be relieved as counsel Filed by Petitioner  
GREGORY T ANNIGIAN

COUNSEL:

|                    |                            |
|--------------------|----------------------------|
| ANITA POIRIER      | (CEE)...DONNASUE ORTIZ     |
| DIANE LEE GIEBNER  | (CE )...GREGORY T ANNIGIAN |
| DIANE LEE GIEBNER  | (CPE)...MARIVEL M ZIALCITA |
| GREGORY T ANNIGIAN | (PET)...GREGORY T ANNIGIAN |
| JOEL RYAN HOLT     | (CP )...GREGORY T ANNIGIAN |
| JONI LOVEGROVE     | (CP )...MARIVEL M ZIALCITA |
| JONI LOVEGROVE     | (CPE)...MARIVEL M ZIALCITA |

GENERAL INFORMATION:

**Continued from 12/26/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Motion to be Relieved as Counsel by Gregory T. Annigian ["Petitioner"].

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

1. Petitioner, Gregory T. Annigian, makes this motion to be relieved as counsel under Code of Civil Procedure section 284(2) instead of filing consent under section 284(1) due to Conservator's lack of cooperation and the complete and irreparable break down of the attorney-client relationship to be explained in chambers only.
2. Need Notice of Hearing with proof of service to include service to bonding company, Suretec Insurance Company per Pr. C. §1213.
3. Need Notice of Hearing with proof of service to include service of a copy of the proposed order as required by CRC 3.1362(d).
4. ~Proposed Form Order 09/14/17.

RECOMMENDATION:

Require notice then Court's discretion.

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

(nb)

Future Hearing:

05/23/18 Compliance review hearing

05/23/18 Accounting Review.

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 02/13/18      TIME: 9:30      DEPT: S35P  
-----

CASE#: CON PS1500362

CASE NAME: BARBARA JEAN HIRSCHMANN

HEARING:

Accounting Review

COUNSEL:

|                         |                             |
|-------------------------|-----------------------------|
| BARBARA JEAN HIRSCHMANN | (CEP)...WALTER T. MOORE     |
| CHRISTIE M. DAVIDSON    | (CPE)...HORSPOOL & HORSPOOL |
| MICHELE GIBBONS         | (PET)...CRAIG M PARKER      |
| PUBLIC GUARDIAN         | (CPE)...COUNTY COUNSEL      |

#### GENERAL INFORMATION

**Continued from 07/11/17** attorney Craig Parker indicates to the court that Barbara Jean Hirschmann passed away on 06/08/17. Continuance requested to file accounting.

**Continued from 10/03/17 at request of counsel. Account to be filed by 01/16/18. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Court appointed Barbara Jean Hirschmann conservator of the person and estate on 07/12/16, \$70,000 bond.
2. Final Inventory and Appraisal filed 02/21/17. Estate valued at \$4,651.84. However, need amended inventory that includes real property appraised by Probate Referee.
3. **Need 1<sup>st</sup> and final account to include pre and post-death accounting periods along with copy of Trustee's Deed upon Sale.**
4. Per minute order dated 03/21/17, counsel informed the court that the real property was foreclosed and the conservatee was still in possession subject to lawsuit. This is an estate with a loss.

#### RECOMMENDATION

Inquire status.

(lh/nb/cs/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 02/13/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1700012

CASE NAME: LYDA M SHILLINGBURG

HEARING:

FIRST AND FINAL Account and Report of DONNA WASHBURN and  
Petition for allowance of fees filed.

COUNSEL:

DONNA WASHBURN                      (PET)...PRO/PER  
LYDA M SHILLINGBURG                (CPE)...JENNIFER M DANIEL

GENERAL INFORMATION:

Conservatee passed away on 03/30/17.

THIS CASE IS SET FOR HEARING ON **AMENDED** (01/16/18) First and Final Account and Petition for Fees by Temporary Conservator of the Person and Estate, Donna Washburn ["Petitioner"].

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

1. **Inventory and Appraisal filed 01/16/18 reflects \$0.00 assets. Petition indicated the assets of the Conservatee were held in the Conservatee's Trust; assets never moved into the Conservatorship; and petitioner had signatory authority in the Trust Account.**
2. Accounting period 01/23/17 to 05/19/17.
3. **Assets on Hand \$0.00.**
4. Petitioner waives compensation **and does not seek reimbursement.**
5. **Temporary Conservator has arranged for the payment of attorneys' fees outside of the conservatorship estate as there are insufficient assets.**
6. Petition alleges this estate is subject to the terms of The Shillingburg Living Trust and under its testamentary provisions, Petitioner's sister, Marti Mackey, is the Successor Trustee to the Conservatee. In order to facilitate the testamentary dispositions, Ms. Mackey instructed Petitioner to distribute certain sums described in Schedule B [LF, p. 9] to the beneficiaries, totaling \$296,000.
7. Need Notice of Hearing with proof of service.
8. No proposed order. Submit Order after Hearing.

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

**RECOMMENDATION:**

Require notice then Court's discretion. If approved, set next hearing for receipts and final discharge for 02/19/19.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 02/13/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700022

CASE NAME: MTR OF MARLENE M YANEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MARLENE M YANEZ (CTP)...JACK B OSBORN

SILVIA L YANEZ (CP)...PRO/PER

GENERAL INFORMATION:

Continued from **03/07/17**. No appearance. Court continues hearing and sets OSC re dismissal. Court notes that if petitioner does not appear at next hearing, or have all probate notes cleared, Court will dismiss petition at next hearing date.

Continued from **06/13/17 and 09/12/17** for petitioner to clear notes. Attorney Jack B. Osborn appointed. Notice by Judicial Assistant.

**Continued from 12/12/17 at request of petitioner. Proposed conservatee is to contact Jack Osborn's and Mark Flory's offices to facilitate with clearing probate notes.**

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by mother, Silvia L. Yanez ["Petitioner].

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. Report of court-appointed counsel Jack Osborn, filed.
3. List of Required Contacts does not include father or sibling. Need corrected form.
4. **Medical Capacity Declaration is not dated. Court to determine if sufficient.**
5. Need Notification to Court of Conservatorship Address form.
6. Need return of Citation.
7. Court Investigator Report filed 02/28/17.
8. Need Inland Regional Center Report.
9. Certificate of Completion re Conservatorship Class filed.
10. Need Notice of Hearing with proof of service, to include Inland Regional Center and Due Diligence Declarations as to paternal grandparents.

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

11. ~Proposed Form Order: 01/23/17

**RECOMMENDATION:**

Need to clear notes. If approved, set hearing for Compliance Review for **09/18/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.  
(nb/lh/nb)

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



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

-----  
DATE: 02/13/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1800002

CASE NAME: Lorena Camacho

HEARING:  
Petition for Appointment of Conservator

COUNSEL:

ALICIA CAMACHO (CP )...  
ARMANDO CAMACHO (CP )...  
LORENA CAMACHO (CTP)..

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by parents, Armando and Alicia Camacho ["Petitioners"].

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. Need report by court-appointed counsel Mathew Sheasby.
3. Need Medical Capacity Declaration.
4. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
5. Proposed limited conservatee's civil and legal rights are not to be limited without a court order.
6. Citation returned SERVED.
7. Screening form by Armando, section 2b is incomplete. Need verified supplement.
8. Screening form by Alicia, sections 2b & 14 are incomplete. Need verified supplement.
9. List of Required Contact Information does not include petitioners. Need same.

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

10. Need Court Investigator Report.
11. Need Inland Regional Center Report.
12. **Certificates of Completion re Conservatorship Class filed.**
13. ~Proposed Form Order/Letters 01/03/18.

**RECOMMENDATION:**

Need to clear notes. If approved, set hearing for Compliance Review for **09/18/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

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

-----  
DATE: 02/13/18 TIME: 9:30 DEPT: S35P  
-----

CASE#: CON PS1800003

CASE NAME: MTR OF CASEY JONES JR

HEARING:

Petition for Appointment of Conservator

COUNSEL:

|                |                 |
|----------------|-----------------|
| CASEY JONES JR | (CEP)...PRO/PER |
| DAMOYA JONES   | (CPE)...PRO/PER |
| TYLIA JONES    | (CPE)...PRO/PER |

GENERAL INFORMATION

Ex parte orders denied on 01/10/18 due to non-appearance by moving parties.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship, person and estate by daughter-in-law, Damoya Jones and granddaughter, Tylia Jones ["Petitioners"].

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

- 1 Petitioners request bond not be required because proposed Conservatee receives only SSI of \$1,198.00/month. JTD.
- 2 Petitioner seeks medical powers. Medical Capacity Declaration filed on 01/03/18 does not include Dementia Attachments GC-313 or Gc-335A; and Sections 4a and 7b are incomplete. Need complete capacity declaration.
- 3 Petitioners request dementia powers; need appointment of counsel and report by same.
- 4 Petition, sections 3e (1) or (2) and 3g are incomplete; 5a erroneously indicates proposed conservatee is developmentally disabled; and section 11 does not include petitioners. Need verified supplement.
- 5 List of Required Contact Information form does not include petitioners. Need same.
- 6 Notice of Conservators Rights is premature and should be completed after order is entered.
- 7 **Court to review Court Investigator's Report filed 02/06/18.**
- 8 Need return of Citation.
- 9 Need Certificates of Completion re Conservatorship Class.
- 10 Need Notice of Hearing with proof of service.

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

**RECOMMENDATION:**

Court to appoint counsel then notes to be cleared. If approved, set hearing for Compliance Review for **09/18/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355). Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **04/23/19**. Any account to be filed 30 days' in advance. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**PROBATE**

-----  
DATE: 02/13/18      TIME: 8:30      DEPT: S36P  
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CASE#: PRO PS1100186

CASE NAME: MATTIE WEAVER

HEARING:

Accounting Review

COUNSEL:

|                               |                             |      |
|-------------------------------|-----------------------------|------|
| CARMEN J QUALLS               | (                           | )... |
| LAW OFFICE OF JAMES B. CHURCH | (MARK J. ANDREW FLORY       |      |
| LYLE STOTELMYRE               | (PET)...M DANIEL SAYLOR     |      |
| MATTIE WEAVER                 | (DEC)...                    |      |
| REGINA D HOLT                 | (PET)...PRO/PER             |      |
| ROSS A. FOREMAN               | (PET)...PRO/PER             |      |
| SHARON FOREMAN                | (APP)...HORSPOOL & HORSPOOL |      |
| SHARON FOREMAN                | (PET)...HORSPOOL & HORSPOOL |      |
| STANLEY FOREMAN               | (PET)...HORSPOOL & HORSPOOL |      |
| STANLEY RAY FOREMAN           | (OBJ)...HORSPOOL & HORSPOOL |      |

**XREF: CONPS0800284** (Mattie Lee Weaver)

**CONDS1000220** (Joe Edward Bush)

**PROPS1400012** (Joe Edward Bush)

GENERAL INFORMATION:

**Continued since 8/8/13 and last on 2/3/15.** Counsel to update court as to appeal. As to bond, court will dispense with requirement for bond as to Lyle Stotelmyre. If Lyle Stotelmyre locates cash in estate, counsel to request bond review.

On 8/4/15 court orders matter reset to 8/26/15 to be heard with related case PROPS1400012.

**Continued from 08/26/15, 12/03/15, and reset on 05/25/16.**

**Continued from 02/22/17 and 08/15/17.** Counsel advises Court matter is still in appeals.

**Continued from 11/14/17. Counsel states the appeal has been affirmed. Counsel to file a petition for distribution. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON Accounting Review (re; Lyle Stotelmyre).

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

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

1. Letters of Administration issued to Lyle Stotelmyre on 05/31/12, full authority, \$20,000 bond.
2. Corrected I&A filed 3/12/13 by POA Stanley Foreman. However, need Final I&A by administrator, Lyle Stotelmyre with supporting account statements.
3. Need accounting.
4. Court to see confidential declaration filed 09/25/15.

RECOMMENDATION:

Inquire status.

(vet/kra/vet/kra/vet/gls/cbr/vet/cbr/nb/lc/lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 02/13/18      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1300354

CASE NAME: TIMOTHY F NOLAND

HEARING:

Probate status report filed.

COUNSEL:

AMBER DAWN NOLAND

(PET)...LOEB & LOEB LLP

CAROL NOLAND

(PET)...BEST BEST & KRIEGER

TIMOTHY F NOLAND

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report (filed 11/30/17) by Executrix, Amber D. Noland ["Petitioner"-daughter].

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

1. Petitioner alleges the estate is not in a condition to be closed as a recent settlement agreement was entered into and the petitioner is in the process of preparing a Petition for Final Distribution of the estate.
2. Petitioner requests an additional 2 months to close the estate.
3. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 02/13/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1400386

CASE NAME: William Arthur Lee

HEARING:  
Accounting Review

COUNSEL:

|                       |                            |
|-----------------------|----------------------------|
| CHRISTIAN DYMALLY-LEE | (PET)...VARNER & BRANDT    |
| ENID ALLEN            | (PET)...LINDA ROSE FESSLER |
| JOYCE LEE WEEKS       | (OBJ)...LINDA ROSE FESSLER |
| PUBLIC ADMINISTRATOR  | (PET)...CRAIG M PARKER     |
| WILLIAM ARTHUR LEE    | (DEC)...                   |

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review (re Christian Dymally-Lee)

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

1. Letters of Special Administration issued 08/06/14, \$50,000 bond. Second Amended Letters of Special Administration issued 01/21/15, \$100,000 bond. Third Amended Order for Letters of Special Administration entered 05/11/15, \$100,000 bond (no letters). Order Removing Special Administrator entered 02/08/16 (PA appointed Special Administrator).
2. Order Approving First and Final Account entered 04/25/17.
3. Order Appointing Administrator, full authority, \$100,000 entered 04/26/17.
4. General Letters of Administration issued 05/25/17, full authority, \$100,000 bond.
5. Need final inventory and appraisal with supporting bank/financial statements per Local Rule 20-908.
6. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb)



Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 02/13/18      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1500766

CASE NAME: JAMES A FLAGG

HEARING:

Accounting Review

COUNSEL:

BARBARA J FLAGG

(PET)...PRO/PER

JAMES A GLAGG

(DEC)...

#### GENERAL INFORMATION

**Continued from 10/23/17 and 12/04/17 to file an accounting and final I&A**

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Testamentary issued to Barbara Flagg, sister, on /10/06/15; full authority, no bond.
2. Previous status report approved on 06/19/17
3. **Need** accounting or status report.

#### RECOMMENDATION

Need to clear note 3.

(ww/nb)

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

-----  
DATE: 02/13/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1500855

CASE NAME: DOLORES W. STABNAU REVOCABLE TRUST ETC

HEARING:

Second Account and Report of SUSAN PETERS and Petition for allowance of fees filed.

COUNSEL:

DOLORES W. STABNAU REVOCABLE T (TRU)...  
SUSAN PETERS (PET)...PATRICIA A LOBELLO  
SUSAN PETERS (TEE)...PATRICIA A LOBELLO

**XREF: CONPS1300159** (Dolores W Stabnau)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Second Account Current and Petition for Fees and Reduction in Bond by Trustee, Susan Peters ["Petitioner"].

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

1. Accounting period 06/10/15 to 09/14/17 (2.3 years).
2. Assets on Hand \$626,391.40 consisting of \$120,648.20 in cash and remaining in securities and real properties.
3. Petitioner requests compensation of \$3,528.00. Billed at \$30/hour for 117.60 hours. Itemized [LF, pgs. 52-54]. JTD.
4. Attorney requests fees of \$7,225.00. Billed at \$400/hour for 10.90 hours attorney time and \$150/hour for 19.10 hours paralegal time. Itemized [LF, pgs. 57-60]. JTD.
5. **Former bond of 537,000 reduced to \$415,000 at first account.** Petitioner requests a court order decreasing bond by \$105,000 for a total bond of \$310,000. Calculated. JTD.
6. As conservatee resides in a residential facility, question whether rental income is received for properties in Big Bear and Pico Rivera? **Supp. (02/06/18) indicates rental income is not received for these properties as trustee has been preparing to list the properties for sale.**

7. **Supp. (02/06/18) indicates the primary trust beneficiary, Dolores W. Stabnau, died on 12/09/17. Petitioner requests the Court set an Accounting Review in 90 days for a final trust accounting.**
8. Proposed Order 11/15/17 needs to be approved as to form and content by Donnasue Ortiz.

**RECOMMENDATION:**

Court's discretion. If approved, set next hearing for Accounting Review on **05/22/18**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.  
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 02/13/18      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1501155

CASE NAME: THE GEORGE NEWMAN LIVING TRUST 2009

**SEE ALSO 7**

HEARING:

Petition for Approval of Settlement Agreement

COUNSEL:

CHRISTINE LARSON                      (PET)...LAYNE A BARTHOLOMEW  
CHRISTINE LARSON,TRUSTEE      (                      )...  
JASON LARSON                      (PET)...MICHAEL B HICKEN  
JOSHUA LARSON                      (MIN)...  
MATTHEW LARSON                      (MIN)...  
THE GEORGE NEWMAN LIVING TRUST (TRU)...

Currently under review by Legal Research.  
(LR)

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

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

-----  
DATE: 02/13/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1501155

CASE NAME: THE GEORGE NEWMAN LIVING TRUST 2009  
**SEE ALSO 6**

HEARING:

FIRST Account and Report of CHRISTINE LARSON and Petition for allowance of fees filed.

COUNSEL:

CHRISTINE LARSON (PET)...LAYNE A BARTHOLOMEW  
CHRISTINE LARSON, TRUSTEE ( )...  
JASON LARSON (PET)...MICHAEL B HICKEN  
JOSHUA LARSON (MIN)...  
MATTHEW LARSON (MIN)...  
THE GEORGE NEWMAN LIVING TRUST (TRU)...

GENERAL INFORMATION:

Continued from **07/26/16, 10/11/16, 01/17/17 and 04/04/17** at request of counsel. Guardian ad litem represents parts of the funds are being recovered. Continued from **06/06/17 and 08/08/17**. Counsels are working on a settlement to be filed.

**Continued from 10/10/17 and 11/27/17 to be heard with the approval of settlement.**

THIS CASE IS SET FOR HEARING ON First Account Current by Successor Trustee, Christine Larson; Response and Objection to Petition for Removal of Trustee and Appointment of Successor Trustee for Redress of Breach of Trust including Punitive Damages.

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

1. Accounting period 06/30/11 to 02/29/16 (5.8 years).
2. Assets on Hand \$685,692.39 consisting of \$495,181.67 in cash and \$190,510.72 in equities, securities and bonds
3. Disbursements – Schedule C11 reflects multiple loans to Petitioner and payments from the trust in order to purportedly make ends meet during the dissolution of marriage proceedings and to enable Petitioner to settle demands for cash offsets by Jason Larson in the dissolution of marriage settlement [LF, p.

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

110]. Petitioner alleges she was advised that the sections titled “Trustee Self-Dealing – Loan, Buy, Sell” and Trustee and Executor Transactions – Self Dealing Permitted” and the section titled “Loan” of the trust allowed her to loan money to herself from the trust for any purpose and that she did not have to provide any security for the loans. Copy of trust affixed to petition filed 12/09/15.

4. Schedule I1 [LF, p. 99-101] reflects funds to be reimbursed to Trust by Trustee totaling \$729,280.90 less offset of \$27,000 for trustee fees pursuant to trust provisions for a total sum of \$695,546.43 to be reimbursed .
5. Notice given.
6. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Court’s discretion.

(nb/lh/nb/ww/nb)

Superior Court of Calif, County of San Bernardino

Page: 8

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 02/13/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1701157

CASE NAME: ALFONSO SANCHEZ VILLA

**SEE ALSO 9, 10**

HEARING:

Petition for Will Contest and Grounds of Opposition to Probate  
of Will

COUNSEL:

|                                |                            |
|--------------------------------|----------------------------|
| ALFONSO SANCHEZ VILLA          | (DEC)...                   |
| ALICIA ZUNIGA                  | ( )...                     |
| CLAUDIA GOMEZ                  | ( )...                     |
| EDGAR GOMEZ                    | ( )...                     |
| FABIOLA ZUNIGA                 | ( )...                     |
| JOAQUIN RECIO                  | (PET)...VELASCO LAW GROUP  |
| JOAQUIN RECIO                  | (RES)...                   |
| JOAQUIN RECIO AS SUCCESSOR TRU | ( )...                     |
| MARIA NOBLE                    | (PET)...GREGORY T ANNIGIAN |
| MARTHA RODRIGUEZ               | ( )...                     |

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Will Contest and Grounds of Opposition to Probate of Will by Maria Noble ["Petitioner"].

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

1. Petitioner indicates she is the only living issue of the Decedent and alleges that probate of the purported will should be denied as the Decedent was not of sound and disposing mind; the purported will was not executed by Decedent in the manner and form required by law for execution of a will; and claims the purported will is invalid because it was the product of undue influence as defined by Pr. C. § 86 and Welfare and Institutions Code Section 15610.70.
2. Petitioner prays that the purported will be denied probate and for costs.
3. Need proof of service re Summons on Joaquin Recio in his individual capacity and as trustee.

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

**RECOMMENDATION:**  
Require service then set for evidentiary hearing.  
(nb)

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



Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 02/13/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1701157

CASE NAME: ALFONSO SANCHEZ VILLA

**SEE ALSO 8, 10**

HEARING:

Hearing re: Petition for Probate of Will and Letters with limited authority IAEA.

COUNSEL:

|                                |                            |
|--------------------------------|----------------------------|
| ALFONSO SANCHEZ VILLA          | (DEC)...                   |
| ALICIA ZUNIGA                  | ( )...                     |
| CLAUDIA GOMEZ                  | ( )...                     |
| EDGAR GOMEZ                    | ( )...                     |
| FABIOLA ZUNIGA                 | ( )...                     |
| JOAQUIN RECIO                  | (PET)...VELASCO LAW GROUP  |
| JOAQUIN RECIO                  | (RES)...                   |
| JOAQUIN RECIO AS SUCCESSOR TRU | ( )...                     |
| MARIA NOBLE                    | (PET)...GREGORY T ANNIGIAN |
| MARTHA RODRIGUEZ               | ( )...                     |

GENERAL INFORMATION

**Continued from 12/28/17 to be heard with related petition.**

THIS CASE SET FOR HEARING ON

Petition #1: Petition for Probate, Letters Testamentary with **Limited** Authority under IAEA by Joaquin Recio, nephew-in-law/Trustee.

**Petition #2: Petition for Probate, Letters of Administration with Full Authority under IAEA daughter, by Maria Noble.**

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

Petition #1 by Joaquin

1. Will waives bond. Estate consists of \$449,450 in personal property.
2. The will conditionally incorporates decedent's Trust. **Need** a certification of trust that meets the requirements in Pr.C.§18100.5 and additionally includes a list of Trust beneficiaries for notice purposes. Does Court also wish to require a copy of decedent's Trust? JTD
3. **Opposition to Probate of Will filed by Maria Noble.**
4. ~Proposed Form Order: 11/16/17.

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

Petition #2 by Maria

1. Need Attachment 3g(2)(a) explaining priority.
2. Need Duties and Liabilities form.
3. Petitioner alleges she is the only heir at law and waives bond. However, petitioner is a non-resident and court has discretion to require bond per Pr. C. §8571. Estimated estate valued at \$450,000. Need Mandatory Waiver of Bond by Heir or Beneficiary, form DE-142/DE-111. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). JTD.

RECOMMENDATION

Need to clear notes, Court's discretion re bond. If approved, set Accounting/Status Review for **04/25/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 02/13/18      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1701157

CASE NAME: ALFONSO SANCHEZ VILLA

**SEE ALSO 8, 9**

HEARING:

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

COUNSEL:

|                                |                            |
|--------------------------------|----------------------------|
| ALFONSO SANCHEZ VILLA          | (DEC)...                   |
| ALICIA ZUNIGA                  | ( )...                     |
| CLAUDIA GOMEZ                  | ( )...                     |
| EDGAR GOMEZ                    | ( )...                     |
| FABIOLA ZUNIGA                 | ( )...                     |
| JOAQUIN RECIO                  | (PET)...VELASCO LAW GROUP  |
| JOAQUIN RECIO                  | (RES)...                   |
| JOAQUIN RECIO AS SUCCESSOR TRU | ( )...                     |
| MARIA NOBLE                    | (PET)...GREGORY T ANNIGIAN |
| MARTHA RODRIGUEZ               | ( )...                     |

See prior matter #9.

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 02/13/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800025

CASE NAME: Paul Angle

HEARING:

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

COUNSEL:

LAURA PFEIFER (PET)...PRO/PER  
PAUL ANGLE (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by Executrix, Laura Pfeifer ["Petitioner"-daughter].

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

1. Petitioner submits a type-written document dated 09/22/07 purportedly signed by decedent. It would appear to be a purported Will. However, the 09/22/07 document is not witnessed and thus, does not meet the requirements of Pr.C. §6110. Question the validity of the 09/22/07 document? Need verified supplement with points and authorities to prove the 09/22/07 document is a valid testamentary document.
2. Will waives bond. Estimated estate valued at \$76,000. However, petitioner is a non-resident and court has discretion to require bond per Pr. C. §8571. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). JTD.
3. Need proof of publication.
4. Need Notice of Petition to Administer Estate with proof of service.
5. No proposed order/letters.

RECOMMENDATION:

Need to clear notes then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **04/23/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

-----  
DATE: 02/13/18      TIME: 8:35      DEPT: S36P  
-----

CASE#: TRU PS1800006

CASE NAME: JACKIE L CHILES REVOCABLE TRUST

HEARING:

Petition for appointing Sandie Atkinson as successor trustee

COUNSEL:

JACKIE L CHILES REVOCABLE TRUS  
SANDIE ATKINSON

(TRU)...

(PET)... MARY M. BADER

**X-REF: PROPS 1700613**

Currently under review by Legal Research.

(LR)

Notice given.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIPS**

-----  
DATE: 02/13/18      TIME: 9:30      DEPT: S36P  
-----

CASE#: CON PS0900114

CASE NAME: ALEXANDER T. SEGAL

HEARING:

Hearing Re: TRANSFER CONSERVATORSHIP TO ORANGE COUNTY

COUNSEL:

ALEXANDER T. SEGAL

(PCE)...NOREEN FONTAINE

CINDY FABRICIUS-SEGAL

(PCR)...CHRISTOPHER A POULOS

MARK SEGAL

(PCR)...CHRISTOPHER A POULOS

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Transfer of Conservatorship to Orange County.

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

1. Matter set on court's motion.
2. Need to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).
3. Notice by Judicial Assistant.

RECOMMENDATION:

Need to clear note 2 then Court's discretion.

(nb)

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

-----  
DATE: 02/13/18 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1200325

CASE NAME: Catherine Connor

HEARING:  
Hearing re Final Discharge

COUNSEL:

|                  |                            |
|------------------|----------------------------|
| CATHERINE CONNOR | (CEP)...MITCHELL I ROTH    |
| CATHERINE CONNOR | (CTE)...PRO/PER            |
| JULIET CONNOR    | (CE )...GREGORY T ANNIGIAN |
| JULIET CONNOR    | (CPE)...GREGORY T ANNIGIAN |
| MITCHELL I ROTH  | (PET)...MITCHELL I ROTH    |
| ROXANNE RHOADES  | (PET)...GREGORY T ANNIGIAN |

**X-REF: PROPS 1600694**

GENERAL INFORMATION:

Continued from **10/31/17**. No appearances. Notice by Judicial Assistant.

**Continued from 12/05/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Final Discharge by Conservator of the Person and Estate, Juliet Connor.

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

1. Order Settling Second and Final Account entered 11/01/16.
2. Need receipt from Personal Representative.
3. Need Ex-Parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 02/13/18 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1700105

CASE NAME: MTR OF JUAN A SAINZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of MARIA A SAINZ

COUNSEL:

JUAN A SAINZ (CTP)...ROSE C ROSADO  
MARIA A SAINZ (CP )...PRO/PER

GENERAL INFORMATION

Order appointing Maria A. Sainz Limited Conservator of the Person entered 07/12/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

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

RECOMMENDATION:

None.  
(nb)



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 02/13/18      TIME: 9:30      DEPT: S36P  
-----

CASE#: CON PS1700205

CASE NAME: RICHARD LEE REYNOLDS

HEARING:

Accounting Review

COUNSEL:

RICHARD LEE REYNOLDS      (CEP)...PRO/PER

ROBERT B ROGERS      (CPE)... LAYNE A BARTHOLOMEW

GENERAL INFORMATION:

Conservatee passed away on 08/30/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order appointing Robert B. Rogers Temporary Conservator entered 06/12/17, \$32,000 bond; general order appointing conservator of the person and estate entered 07/11/17, \$32,000 bond.
2. Need final Inventory & Appraisal per Pr.C. §2610.
3. Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C. §2610.
4. Need pre & post death accounting per Pr. C. §2620.

RECOMMENDATION:

Inquire status.

(nb)

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

-----  
DATE: 02/13/18      TIME: 8:30      DEPT: S37P  
-----

CASE#: PRO DS1000649

CASE NAME: PEGGY JEAN SMITH BADER

HEARING:

THIRD Account and Report of JAMES M BADER and Petition for allowance of fees filed.

COUNSEL:

|                        |                        |
|------------------------|------------------------|
| JAMES M BADER          | (PET)... MARY M. BADER |
| JAMES MICHAEL BADER    | (PET)...PRO/PER        |
| PEGGY JEAN SMITH BADER | (DEC)...               |

GENERAL INFORMATION

Continued from **04/27/17, 06/26/17, 09/18/17 and 11/27/17. Counsel reports a substitution of attorney will be filed today.**

THIS CASE SET FOR HEARING ON 3<sup>rd</sup> SNT Account of Mark Bader by James Bader, brother.

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

1. Accounting period 08/20/14 – 10/19/16.
2. Assets on hand \$99,097.42; cash. \$22,145.25 spent down from previous accounting.
3. Petitioner waives fees.
4. Accounting indicates there are no receipts, interest or gains.
5. Need notice of hearing with proof of service, including notice to the three state agencies per Pr.C. §§ 3604(a)(2), 3602(f), and 3611(c); Department of Health Services, Director of State Hospitals and Director of Developmental Services as it does not appear they were noticed at the creation of the SNT; only the probate for Peggy.
6. Petitioner requests accounting be heard every 2 years.
7. ~Proposed order submitted 10/12/17

RECOMMENDATION

Need to clear note 5. If approved, set Accounting/Status Review for **2/21/19** (if one year) or **2/20/20** (if two years). Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/nb/cs/nb)

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

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 02/13/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1200479

CASE NAME: CHARLES STERLING RAY

**SEE ALSO 3**

HEARING:

First and final Account and Report of SHERYL HART-RAY and  
Petition for allowance of fees filed.

COUNSEL:

CHARLES STERLING RAY (DEC)...  
SHERYL HART-RAY (PET)...DANIEL C SEVER

GENERAL INFORMATION

**Continued from 11/27/17 at request of court for supplement to be reviewed.**

THIS CASE SET FOR HEARING ON First and Final Account; Petition for allowance of Fees; and for Final Distribution, by Sheryl Hart-Ray, spouse

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

1. Accounting period 02/05/11 to 07/31/17.
2. Assets on Hand \$2,450.00 consisting of cash.
3. Petitioner is sole heir and waives accounting.
4. Inventory and Appraisal filed 08/24/17; however, need account statements verifying the balance of cash on hand per Local Rule 20-908.
5. No bank statement provided per local rule 20-908. Petitioner indicates she is sole beneficiary and not all available cash was invested in interest bearing accounts. JTD
6. Petitioner waives statutory and extra ordinary compensation.
7. Attorney requests statutory compensation of \$780.00 for services rendered. Calculated.
8. Personal representative does not seek any reserve.
9. Notice filed.
10. Proposed Order submitted: 08/24/17.

RECOMMENDATION:

Need to clear note 4, then Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **02/20/19**.

(cs/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 02/13/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1200479

CASE NAME: CHARLES STERLING RAY

**SEE ALSO 2**

HEARING:

Spousal Property Petition hearing.

COUNSEL:

CHARLES STERLING RAY (DEC)...

SHERYL HART-RAY (PET)...SEVER LAW OFFICE

GENERAL INFORMATION

**Continued from 11/27/17 at request of court for supplement to be reviewed.**

THIS CASE SET FOR HEARING ON Spousal Property Petition by Sheryl Hart-Ray

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

1. Petitioner, Sheryl/surviving spouse, seeks court to confirm her half of community property and determine that community property, specifically personal injury settlement, left by decedent passes to petitioner without administration.
2. Petitioner and decedent were married on 04/28/98. Decedent contracted mesothelioma which attributed to his death.
3. **Supplement filed 11/06/17 indicates the parents of decedent predeceased him; decedent had no siblings or issue of siblings; and claims to be the sole heir-at-law.**
4. ~Proposed Form Order: 06/15/17.

RECOMMENDATION

Court's discretion

(lc/cs/nb)

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

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 02/13/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1200918

CASE NAME: SARAH J. MCCLASKEY

HEARING:  
Hearing re Final Discharge

COUNSEL:

LARRY PARKER (PET)...RICHARD I GONZALEZ  
SARAH J MCCLASKEY (DEC)...

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

GENERAL INFORMATION:

Continued from **07/28/15** and **09/22/15** to determine where or whom the funds are to be distributed to as Counsel states there is a pending probate case in Ireland for an heir.

Continued from **12/01/15** to retain attorney service in Ireland to retrieve documents.

Continued from **02/09/16** Counsel still investigating re sister (heir) in Ireland.

Continued from **04/12/16, 6/13/16, 8/22/16 and 11/07/16.**

Continued from **06/27/17.** Amended order to be filed. Matter continued for Counsel to further verify son's and son's counsel's identity. Counsel has determined there is no Irish probate filed.

Continued from **08/22/17** on Court's motion to contact Irish Consulate. If proof of probate, bank account information and proper identification is not provided by a certain deadline, monies may be held. Notice to be given by Mr. Gonzalez.

**Continued from 11/28/17 at request of counsel. Mr. Holohan, currently in Ireland, is attempting to assist Counsel in locating heir. Notice to be given by Mr. Gonzalez.**

THIS CASE IS SET FOR HEARING ON Final Discharge of Administrator w/Will Annexed, Larry Parker.

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

1. Order Settling First and Final Account entered 07/29/14.
2. No receipts filed. Need same.
3. Need Ex-Parte Petition/Order for Final Discharge.

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

4. Declaration filed 02/03/16 alleges Lillian Thompson may be deceased and requests additional time to further investigate when/if Ms. Thompson died.
5. Notice filed 11/04/16 does not give 15 days' notice. Need proper service.
6. Notice filed 11/04/16 affixes a declaration by Attorney Richard L. Gonzalez regarding final distribution, which indicates that an amended order is forthcoming. **Need amended Order.**
7. **Need verified supplement identifying son and son's counsel.**

RECOMMENDATION:

Need to clear notes. When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with Pr.C. § 8505.

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

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 02/13/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1501069

CASE NAME: MTR OF JAMES BROWN SUMPTER

HEARING:

Hearing re Final Discharge

COUNSEL:

|                       |                          |
|-----------------------|--------------------------|
| JAMES BROWN SUMPTER   | (DEC)...                 |
| JAMES SUMPTER         | (J. DAVID HORSPOOL       |
| NORMA SUMPTER         | (PET)...MATHEW ALDEN     |
| SONIA SUMPTER-JACKSON | (TP)...J. DAVID HORSPOOL |

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge of Administrator, Norma Sumpter.

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

1. Order Settling First and Final Account entered 02/09/17.
2. Need informal account for reserves per Local Rule 20-911.
3. Need Ex-Parte Petition/Order for Final Discharge.

RECOMMENDATION:

Need to clear note(s) 2-3.

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 02/13/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1600025

CASE NAME: MTR LOREN L KIRK

**SEE ALSO 7, 8, 9**

HEARING:

Hearing Re: COMPLAINT FOR FRUAD, MISREPRESENTATION, ECT

COUNSEL:

|                  |                                  |
|------------------|----------------------------------|
| BARBARA SAGEHORN | (EMISON HULLVERSON LLP           |
| CAROL MARSHALL   | (PET)...EMISON HULLVERSON LLP    |
| DANIEL BROWN     | (PET)...LURIE, ZEPED A, SCHMALZ, |
| DENNIS SHOGREN   | (PET)...E JOAN NELMS             |
| JOAN CUNNINGHMAN | (PET)...EMISON HULLVERSON LLP    |
| LOREN L KIRK     | (DEC)...                         |
| RAYMOND J LOPEZ  | ( )...                           |
| WILLIAM N CARTER | (OBJ)...EMISON HULLVERSON LLP    |
| WILLIAM N CARTER | (PET)...EMISON HULLVERSON LLP    |

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

Currently under review by Legal Research.  
(LR)



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 02/13/18      TIME: 8:30      DEPT: S37P  
-----

CASE#: PRO PS1600025

CASE NAME: MTR LOREN L KIRK

**SEE ALSO 6, 8, 9**

HEARING:

Motion Re: Order imposing terminating sanctions Filed by  
Petitioner WILLIAM N CARTER

COUNSEL:

|                  |                                  |
|------------------|----------------------------------|
| BARBARA SAGEHORN | (EMISON HULLVERSON LLP           |
| CAROL MARSHALL   | (PET)...EMISON HULLVERSON LLP    |
| DANIEL BROWN     | (PET)...LURIE, ZEPED A, SCHMALZ, |
| DENNIS SHOGREN   | (PET)...E JOAN NELMS             |
| JOAN CUNNINGHMAN | (PET)...EMISON HULLVERSON LLP    |
| LOREN L KIRK     | (DEC)...                         |
| RAYMOND J LOPEZ  | ( )...                           |
| WILLIAM N CARTER | (OBJ)...EMISON HULLVERSON LLP    |
| WILLIAM N CARTER | (PET)...EMISON HULLVERSON LLP    |

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

Currently under review by Legal Research.  
(LR)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 02/13/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600025

CASE NAME: MTR LOREN L KIRK

**SEE ALSO 6, 7, 9**

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

|                  |                                  |
|------------------|----------------------------------|
| BARBARA SAGEHORN | (EMISON HULLVERSON LLP           |
| CAROL MARSHALL   | (PET)...EMISON HULLVERSON LLP    |
| DANIEL BROWN     | (PET)...LURIE, ZEPED A, SCHMALZ, |
| DENNIS SHOGREN   | (PET)...E JOAN NELMS             |
| JOAN CUNNINGHAM  | (PET)...EMISON HULLVERSON LLP    |
| LOREN L KIRK     | (DEC)...                         |
| RAYMOND J LOPEZ  | ( )...                           |
| WILLIAM N CARTER | (OBJ)...EMISON HULLVERSON LLP    |
| WILLIAM N CARTER | (PET)...EMISON HULLVERSON LLP    |

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

GENERAL INFORMATION:

Continued from **03/01/16**. Attorney Mark Bridges states that he will be filing a will contest. Attorney David Philipson can file an ex parte for letters of special administration to address the issue with the red tagged property & funds that are not able to be deposited w/o letters.

Continued from **05/03/16**. Dennis Shogren appointed special administrator, \$4,000,000 bond.

Continued from **05/19/16, 06/30/16, 09/15/16, 01/10/17 and 05/04/17**. Counsel reported private mediation will be heard in late July or August. Counsel Church to lodge a copy of report with court. Judge Reilly will inform parties where they will be assigned and when their trial readiness hearing will be heard.

Continued from 08/03/17. Matter assigned for a long-cause trial to S26 with Judge **Cohn. Counsel reported that standing is an issue. Trial readiness taken off calendar pending next hearing.**

**Continued from 10/26/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON

- Petition 1- for Letters Testamentary with full authority under IAEA by named executor, Daniel Brown.
- Petition 2- for Letters of Administration with full authority under IAEA by Dennis Shogren CPA.

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

**Petitioner 1 Daniel Brown, executor**

1. Petitioner requests \$43,200,000.00 bond be posted. Appears adequate.
2. Proof of Subscribing Witness filed 02/23/16.
3. **Need** Notice of Petition to Administer Estate with proof of service.
4. Lengthy Declaration filed by petitioner on 03/13/17 indicating personal property held. It appears that remaining items are minimal, keys, laptop, 2 motorcycles in disrepair and pennies.
5. **Objections filed by William Carter, Joan Cunningham and Carol Marshall on 02/26/16. Objections and will contest also filed by same parties on 05/03/16. Proof of summons filed 06/29/16 per Pr.C. § 8250.**
6. **First amended Contest and Grounds of Objection to Probate filed 11/10/16 by William N. Carter, Joan Cunningham and Carol Marshall. Proof of service filed 11/10/16. However, need proof of summons of amended Contest per Pr. C. § 8250.**
7. **Reply and Objections to First Amended Contest filed 01/03/17 by Daniel Brown.**
8. **Supp with joinder filed 07/20/17. Barbara Sagehorn, paternal aunt of decedent joins in petition for probate and does not object. Court to clarify if Barbara is merely approving petition by Daniel or is seeking to be co-administrator.**
9. ~Proposed Form Order/Letters 01/11/16.

**Petitioner 2 Dennis Shogren, CPA**

10. Petitioner requests bond of \$1,000,000. Estate is valued at \$43,200,000.
11. Petitioner attaches will; however, is not probating the will.
12. Petitioner is nominee by cousins; the only heirs at law William Carter, Joan Cunningham and Carol Marshall.
13. List of firearms filed on 05/23/17.
14. ~Proposed Form Order: 05/4/16.

RECOMMENDATION:

Matter is contested, need to clear note 3 & 6. Petitioner 1 appears to have higher priority. If approved, set future hearing for Accounting/Status Review on **04/23/19**. Any account to be filed 30 days in advance. Note requirements of Local Rules.  
(nb/lc/nb/lc/nb)

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San Bernardino District

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DATE: 02/13/18      TIME: 8:30      DEPT: S37P  
-----

CASE#: PRO PS1600025

CASE NAME: MTR LOREN L KIRK

**SEE ALSO 6, 7, 8**

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS TESTAMENTARY WITH  
FULL AUTHORIZATION TO ADMINISTER UNDER IAEA

COUNSEL:

|                  |                                  |
|------------------|----------------------------------|
| BARBARA SAGEHORN | (EMISON HULLVERSON LLP           |
| CAROL MARSHALL   | (PET)...EMISON HULLVERSON LLP    |
| DANIEL BROWN     | (PET)...LURIE, ZEPED A, SCHMALZ, |
| DENNIS SHOGREN   | (PET)...E JOAN NELMS             |
| JOAN CUNNINGHMAN | (PET)...EMISON HULLVERSON LLP    |
| LOREN L KIRK     | (DEC)...                         |
| RAYMOND J LOPEZ  | ( )...                           |
| WILLIAM N CARTER | (OBJ)...EMISON HULLVERSON LLP    |
| WILLIAM N CARTER | (PET)...EMISON HULLVERSON LLP    |

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

See notes on matter 8.

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DATE: 02/13/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600298

CASE NAME: MTR OF MIATTA NATALIE O MASSAQUOI

HEARING:

Accounting Review

COUNSEL:

|                                |                          |
|--------------------------------|--------------------------|
| ALBERT S MASSAQUOI             | (PET)...PRO/PER          |
| ALBERT S MASSAQUOI             | (TP )...PRO/PER          |
| COURTENAY VIVIAN ROGERS-WRIGHT | (PET)...HOWARD R HAWKINS |
| GIFTY FOWLER                   | (PET)...HOWARD R HAWKINS |
| MIATTA NATALIE O MASSAQUOI     | (DEC)...                 |

#### GENERAL INFORMATION

**Continued from 11/27/17. Petition for successor/removal of administrator may be filed.**

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 Courtney Rogers-Wright, friend, on 11/22/16, full authority, \$75,000 bond.
2. **Need** Final Inventory and Appraisal.
3. **Need** accounting or status report.
4. **Notice of Non-payment of Bond Premium filed.**

#### RECOMMENDATION

Inquire status  
(cs/nb)

Future Hearing:

03/13/18 Petition for Removal of Courtney Vivian Roberts-Wright etc.

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

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 02/13/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1700017

CASE NAME: ERNEST ALLEN BECKSTROM

**SEE ALSO 12, 13, 14**

HEARING:

Motion Re: Strike Entire Petition for Letters with Full  
Authority Filed by Petitioner KURT BECKSTROM

COUNSEL:

ERNEST ALLEN BECKSTROM      (DEC)...

JAMES F BAKER      (PET)...BANKS GARCIA & JANIS

KURT BECKSTROM      (PET)...ROBERT J SPITZ

Request for Waiver of Court Fees and Costs filed by KURT BECKSTROM is GRANTED

Currently under review by Legal Research.  
(LR)

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PROBATE/CONSERVATORSHIP CALENDAR  
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DATE: 02/13/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700017

CASE NAME: ERNEST ALLEN BECKSTROM

**SEE ALSO 11, 13, 14**

HEARING:

Petition for LETTERS TESTAMENTARY W/ FULL IAEA

COUNSEL:

ERNEST ALLEN BECKSTROM (DEC)...  
JAMES F BAKER (PET)...BANKS GARCIA & JANIS  
KURT BECKSTROM (PET)...ROBERT J SPITZ

**X-REF: MWV 17007117; FWV 1402081**

GENERAL INFORMATION:

Continued from **03/20/17 and 05/24/17**. Court will require bond of \$602,140 for Mr. Baker and \$75,000 as to Mr. Beckstrom. Parties to meet and confer re rental properties.

Continued from **07/26/17** Court recommends hiring a property manager. Counsel stipulate to property manager Samson Debebe, to be manager of the properties subject to James Baker residing in the home. Discovery to be conducted.

Continued from **09/21/17**. By agreement the Court will appoint Samson Debebe as special administrator to handle the properties. Matter continued for Mr. Debebe to be contacted and asked if he wants to accept the appointment. If he does not want to act as Special Administrator, Court requests Counsel attempt to find another person who would be willing to act in that capacity. The Court orders Mr. Baker provide mortgage statements and proof of payments made to counsel.

**Continued from 10/03/17 and 12/05/17 at request of counsel to trail other hearings set. Notice waived.**

THIS CASE IS SET FOR HEARING ON

- Petition 1 - Petition for Letters Testamentary with full authority under IAEA by named executor, **James F. Baker, friend**.
- Petition 2 - Petition for Letters of Administration with **limited** authority under IAEA by **Kurt Beckstrom, brother/caretaker**.

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

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

**Petitioner 1 – James Baker, friend.**

- 1 Sole beneficiary waives bond. Need bond of \$602,140.
- 2 **Proofs of Subscribing Witness filed.**
- 3 **Objections by Kurt Beckstrom filed 03/03/17.**
- 4 **Reply to Opposition filed by Kurt Beckstrom on 09/18/17.**
- 5 **Will Contest and Grounds of Opposition of Purported Will filed by Kurt Beckstrom on 09/21/17. Need return of served Summons.**
- 6 ~Proposed Form Order 01/10/17.

**Petitioner 2 – Kurt Beckstrom, brother/caretaker.**

1. Petitioner alleges he is sole heir and waives bond. Personal property valued at \$27,400; real property net \$520,000. As petitioner is seeking limited authority, court may wish to require bond of \$27,400. JTD
2. **Objections by James F. Baker filed 09/08/17. Need proof of service.**
3. **Declaration by Attorney Spitz filed 09/18/17.**
4. **Declaration of Real Estate Broker, Samson Debebe, filed 09/18/17. Supplemental filed 09/21/17.**
5. ~Proposed Form Order: 03/03/17.

RECOMMENDATION:

Need to clear note 2 for petition 2; then set for contested hearing. If approved, set future hearing for Accounting/Status Review on **02/19/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.  
(nb/lc/lh/lc/cs/nb)



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San Bernardino District

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DATE: 02/13/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1700017

CASE NAME: ERNEST ALLEN BECKSTROM

**SEE ALSO 11, 12, 14**

HEARING:

Petition for LETTERS OF ADMINISTRATION W/LIMITED IAEA

COUNSEL:

ERNEST ALLEN BECKSTROM      (DEC)...

JAMES F BAKER                      (PET)...BANKS GARCIA & JANIS

KURT BECKSTROM                      (PET)...ROBERT J SPITZ

Request for Waiver of Court Fees and Costs filed by KURT BECKSTROM is GRANTED

See notes on matter #12.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

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CASE#: PRO PS1700017

CASE NAME: ERNEST ALLEN BECKSTROM

**SEE ALSO 11, 12, 13**

HEARING:

Trial Setting Conference

COUNSEL:

ERNEST ALLEN BECKSTROM      (DEC)...

JAMES F BAKER      (PET)...BANKS GARCIA & JANIS

KURT BECKSTROM      (PET)...ROBERT J SPITZ

Request for Waiver of Court Fees and Costs filed by KURT BECKSTROM is GRANTED

No notes – TSC.

(nb)

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

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DATE: 02/13/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1700634

CASE NAME: MTR OF ELEANOR RAE NEWCOMER

HEARING:

Spousal Property Petition hearing.

COUNSEL:

ELEANOR RAE NEWCOMER      (DEC)...

TERRA HAGEL      (PET)...BLAKE D THOMPSON

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

**XREF: PROPS1700089** (Richard A Newcomer)

GENERAL INFORMATION:

Decedent passed away on 04/29/07.

**Continued from 10/16/17 and 11/27/17 for supplement clearing address of Connie Ericson and notice to Walter Ericson to be filed.**

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Personal Representative in related case, Terra Hagel ["Petitioner"].

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

1. Petitioner requests determination of property passing to the surviving spouse as community property. Specifically, real property located at Chino, CA, in San Bernardino County. However, petitioner does not set forth facts sufficient to establish a community property interest in the California real property. When were the parties married? How was the property interest acquired – with community funds, etc? **Supp. filed 11/09/17 indicates decedent and spouse were married on 05/16/93 and purchased said property during the marriage on or about 08/94. Despite the vesting of the property as tenants in common as to Richard and Eleanor, subject property is entirely community property and any interest Eleanor maintained therein at date of death passed to her husband, Richard as community property though interstate succession.**
2. Petitioner alleges the title vesting on said improved real property is held as "Tenants in Common" and claims Decedent's interest in the property passes to

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

Richard A Newcomer, who died on 12/21/16, in the related case. **Copy of Grant Deed recorded 08/05/94 with vesting as “joint tenants filed. [Supp. filed 11/09/17, LF, p. 7] JTD.**

3. Petitioner states the subject property has been sold in the related case and during escrow, the vesting title was determined to be problematic and requests this Court determine ownership so that the sale can move forward.
4. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Court's discretion.

(nb/cs/nb)

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DATE: 02/13/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1701049

CASE NAME: RICHARD KELLY

HEARING:

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

COUNSEL:

BRUCE H GAYNOR (PET)...TRENTON M DIEHL  
RICHARD KELLY (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full  
authority under IAEA by brother, Bruce H. Gaynor ["Petitioner"].

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

1. Non-resident petitioner requests a bond in the amount of \$300,000 be fixed.  
Appears sufficient. JTD.
2. No proposed order/letters.

RECOMMENDATION:

RFA, \$300,000 bond. If approved, set future hearing for Accounting/Status Review on  
**04/23/19**. Any account to be filed 30 days in advance of hearing. Note requirements of  
Local Rules.

(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 02/13/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1701089

CASE NAME: MTR OF BLENDIA GAIL FOX

HEARING:

Petition for letters of administration with full authorization  
to administer under iaea

COUNSEL:

BLENDIA GAIL FOX

(DEC)...

ROGER WILLIAM FOX

(ADM)...PRO/PER

GENERAL INFORMATION:

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

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

1. Petitioner requests bond be fixed at \$15,000. Estimated estate valued at  
(-) \$151,630.48. JTD.
2. ~Proposed Form Letters 10/23/17.

RECOMMENDATION:

Court's discretion re bond. If approved, set future hearing for Accounting/Status  
Review on **04/23/19**. Any account to be filed 30 days in advance of hearing. Note  
requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 02/13/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1701297

CASE NAME: MTR OF GEORGIA CONWAY

HEARING:

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

COUNSEL:

GEORGIA CONWAY

(DEC)...

ROBERT CAMPBELL

(PET)...KESTLER DERRYBERRY LLP

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by son, Robert Campbell ["Petitioner"].

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

1. Will is not self-proving. Proofs of Subscribing Witnesses filed.
2. Beneficiaries waive bond. Estimated estate valued at \$118,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
3. Need proof of publication.

RECOMMENDATION:

Need to clear note 3 then Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **04/23/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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DATE: 02/13/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1701298

CASE NAME: MTR OF FRANCISCO MALDONALDO

HEARING:

Petition to determine succession to Real Property

COUNSEL:

FRANCISCO MALDONADO (DEC)...  
LOUIE MALDONADO (PET)...PRO/PER

**X-REF: CIVDS 1614246**

GENERAL INFORMATION:

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

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

1. Petitioner request a determination that decedent's real property located in San Bernardino County pass to petitioner without administration. Petitioner is decedent's son and primary beneficiary in decedent's will. Petitioner attaches a copy of decedent's will [LF, p.2].
2. Need Notice of Hearing with proof of service to all issues named in decedents Will.
3. ~Proposed Form Order 12/27/17.

RECOMMENDATION:

Need notice then Court may wish to trail matter to 03/06/18.

(nb)

FUTURE HEARING DATES:

03/06/18 Motion Re: CONSOLIDATION OF CASES



Superior Court of Calif, County of San Bernardino

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DATE: 02/13/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1800028

CASE NAME: MTR OF KATHY ANNE IVINS

HEARING:

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

COUNSEL:

CYNTHIA ANNE IVINS KINNEY      (PET)...PRO/PER

KATHY ANNE IVINS                      (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by Executrix, Cynthia A. Ivins Kinney ["Petitioner"-daughter].

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

1. Will waives bond. Estimated estate valued at \$292,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). JTD.
2. The will conditionally incorporates decedent's Trust. Need a certification of trust that meets the requirements in Pr.C.§18100.5 and additionally includes a list of Trust beneficiaries for notice purposes. Does Court also wish to require a copy of decedent's Trust? JTD
3. ~Proposed Form Order/Letters 01/11/18

RECOMMENDATION:

Need to clear note 2 then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **04/23/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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DATE: 02/13/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800029

CASE NAME: MTR OF LOIS ELLEN CARRINGTON

HEARING:

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

COUNSEL:

|                       |                           |
|-----------------------|---------------------------|
| DAVID CURTIS          | (PET)...BUXBAUM & CHAKMAK |
| LOIS ELLEN CARRINGTON | (DEC)...                  |
| PATRICIA DES LAURIERS | (PET)...BUXBAUM & CHAKMAK |

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by Co-Executors David Curtis and Patricia Des Lauriers ["Petitioner"-issues].

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

1. Decedents Will is not a California Will. Petitioner proffers a verified declaration per Pr. C. § 8221 with copies of signed documentation by Decedent as subscribing witnesses are not available.
2. Will waives bond. Estimated estate valued at \$370,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
3. **Proof of publication filed on 02/01/18 was published 2 times. Needs to be published 3 times per Pr. C. §8121(a).**
4. ~Proposed Form Order/Letters 01/11/18.

RECOMMENDATION:

Need to clear note 3 then Court's discretion re: will and bond. If approved, set future hearing for Accounting/Status Review on **04/23/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

## TRUSTS AND MOTIONS

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DATE: 02/13/18      TIME: 8:35      DEPT: S37P  
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CASE#: PRO PS1701149

CASE NAME: HINOJOSA FAMILY TRUST

HEARING:

Hearing Re: PTN FOR SUSP OF POWERS OF CO-TRUSTEE AND REMOVAL

COUNSEL:

CELIA ANNE KIDSTON

(PET)...HARTNELL LAW GROUP

MARY ANNE STEPHENS

(PET)...BOB MULLEN

THE HINOJOSAFAMILY TRUST

(TRU)...PRO/PER

Currently under review by Legal Research.

(LR)

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HONORABLE: TARA REILLY

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DATE: 02/13/18      TIME: 8:35      DEPT: S37P  
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CASE#: TRU PS1800007

CASE NAME: The Mae Belle Rock Living Trust dated 12/17/2003

HEARING:

Petition for order determining title to property

COUNSEL:

THE MAE BELLE ROCK LIVING TRUS

(TRU)...

THOMAS JOSEPH LAENG Jr

(PET)...LAYNE A BARTHOLOMEW

Currently under review by Legal Research.

(LR)

Notice:

Need Notice of Hearing with proof of hearing to grandchildren, Tiffaney Hernandez, Kourtney Creed, Aorin J. Laeng and son, Thomas J. Laeng, Jr.

(nb)

Superior Court of Calif, County of San Bernardino

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HONORABLE: TARA REILLY

## CONSERVATORSHIPS

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DATE: 02/13/18      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1700207

CASE NAME: MTR OF MADISON LEANN TIBKE

### **SEE ALSO 25**

HEARING:

OSC re: Dismissal

COUNSEL:

DENISE TIBKE

(CP )...PRO/PER

MADISON LEANN TIBKE

(CTP)...WALTER T. MOORE

### GENERAL INFORMATION

Continued from **08/01/17**. Attorney Walter Moore appointed for Madison Leann Tibke.

Continued from **09/26/17**. No appearances. Notice by Judicial Assistant.

**Continued from 11/21/17 on courts motion for petitioner to be present. Notice by Judicial Assistant.**

THIS CASE SET FOR HEARING ON **OSC re Dismissal** on Petition for Appointment of Limited Conservator person only by Denise Tibke (mother)

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

1. Petitioner seeks orders related to powers under Pr. C. §2351.5 to fix residence, access confidential records, control right to contract, make and consent to all medical decisions.
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks medical powers. Need Capacity Declaration.
4. Proposed conservatee is developmentally disabled. Need report of Walter Moore.
5. Proposed conservatee is developmentally disabled. IRC report filed.
6. Court Investigator report filed.
7. Petition, items 11, list of relatives does not include Denise Tibke (petitioner); however, it is clear she is the mother.
8. List of Required Contact Information form is missing paternal grandparents. Need completed form.

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

9. Need Certificate of Completion of the Conservatorship Training Class.
10. Need Notice of Hearing and Proof of Service to include 30 days' notice to Inland Regional Center.
11. Need return of Citation.
12. ~Proposed Form Order: 06/05/17

#### RECOMMENDATION

Need to clear notes 4; 8-11. If approved, set hearing for Compliance Review for **09/19/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.  
(lh/nb/lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 02/13/18      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1700207

CASE NAME: MTR OF MADISON LEANN TIBKE

**SEE ALSO 24**

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DENISE TIBKE

(CP )...PRO/PER

MADISON LEANN TIBKE

(CTP)...WALTER T. MOORE

Request for Waiver of Court Fees and Costs filed by MADISON LEANN TIBKE is GRANTED

See prior matter #24.

(nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 02/13/18      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1700368

CASE NAME: NATALIE RINGLUND

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

BRETT M BAYLESS

(CPE)...WILLIAM J BRUNICK

GERRY D BAYLESS

(CPE)...WILLIAM J BRUNICK

GLENDA M BAYLESS

(CPE)...WILLIAM J BRUNICK

NATALIE RINGLUND

(CEP)...JEANNE E KENNEDY

**VACATE** – bond filed..

(nb)

Future Hearing:

06/18/18 Compliance review hearing

01/28/19 Accounting Review.

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



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

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DATE: 02/13/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700467

CASE NAME: MTR OF HUGO A HERNANDEZ

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
HUGO A HERNANDEZ (CEP)...CRAIG M PARKER  
HUGO DELLANO (CPE)...PRO/PER  
HUGO HERNANDEZ (CTP)...  
WILMA CASTANO (PET)...LENITA A SKORETZ

**X-REF: EAPPS1800010**

GENERAL INFORMATION

**Continued from 02/05/18. Ms. Skoretz reports competing petition has been filed and served and ex parte is set for 2/13/18. The Court orders EAPPS1800010 be transferred to department S37P to be heard with this matter. The Court appoints Walter Moore as guardian ad litem for Hugo A. Hernandez.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Hugo Dellano, son/Petitioner

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

1. Petitioner requests for bond to be waived due to proposed conservatee receiving social security, having dementia and having very low income. Estimated estate value consists of \$240,000 in real property and \$54,400 in personal property. Suggest \$324,000. JTD
2. Petitioner seeks Pr.C. §2590 powers to alter and improve conservatee's real property for the advantage, benefit, and best interest of the proposed conservatee's estate. JTD
3. Petitioner does not seek medical powers; however, section 9 has been checked.
4. Petitioner seeks dementia powers; however, Capacity Declaration not filed. Need Capacity Declaration with required attachments.
5. Petitioner seeks dementia powers. Need report of Craig Parker, appointed counsel.
6. **Need report by GAL, Walter Moore.**

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

7. Need notice of hearing and proof of service.
8. Need return of Citation.
- 9. Court Investigator report filed 01/31/18**
10. Certificate of Completion of the Conservatorship Training Class filed.
11. Court to see Confidential Screening form, LF pgs. 2/4.
12. ~Proposed Form Order: 12/29/17

**RECOMMENDATION: Trail to 03/21/18.**

Need to clear notes 3-8. If approved, set hearing for Compliance Review for **09/18/18** for the filing of the required documents and hearing re Accounting Review for **04/23/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(cs/nb)

Future Hearing:

03/21/18 Petition for appointment of conservator etc.

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DATE: 02/13/18 TIME: 9:30 DEPT: S37P  
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CASE#: EAP PS1800009

CASE NAME: ROTER VS. STRAHORN

HEARING:  
Hearing Re: ELDER ABUSE RESTRAINING ORDER

COUNSEL:  
SAM ROTER (PP)...PRO/PER  
STAN STRAHORN (RP)...  
IAN KIRKPATRICK ( )...

Ex Parte order denied on 01/24/18.

Need Notice with proof of personal service on Respondent Stan Strayhorn.  
(nb)