



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 02/28/18

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

Destruction of Filed Documents:

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

Contacting the Probate Examiners:

Probate Examiners' email address: ProbateNotes@sb-court.org

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

02/13/18lh; 02/23/18lh

Superior Court of Calif, County of San Bernardino

Page: 1

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

DATE: 02/28/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500082

CASE NAME: MTR OF TERESA L FLECKENSTEIN

SEE ALSO 2 3 13

HEARING:

Hearing Re: OSC Re: Settlement

COUNSEL:

TIMOTHY WAYNE FLECKENSTEIN (PET)...BROCK, MARTIN & VOORHEES
TERESA L FLECKENSTEIN (DEC)...
KATHLEEN HEAD (DEF)...DAVID LIVINGSTONE TAUB
BRYAN M TURNER (DAVID LIVINGSTONE TAUB)

XREF: GARSS1300022 SERENA AND JOSHUA SANCHEZ

FAMRS1301184 KATHLEEN M HEAD -N- TIMOTHY W FLECKENSTEIN

GENERAL INFORMATION

Continued from **11/08/17**. Counsel requested to vacate trial date and reset motion re summary judgment. Notice to be given by David Livingstone Taub.

Continued from 01/10/18 at request of Counsel.

THIS CASE IS SET FOR HEARING ON OSC Re: Settlement

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

1. Matter set on 09/27/17, wherein, Counsel informed Court that all parties have come to a settlement. Attorney Voorhees informed Court that she will be filing a formal notice of settlement.

RECOMMENDATION

Inquire status.

(lh)

Future Hearings: 3/19/18-3/23/18: Court Trial

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 02/28/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500082

CASE NAME: MTR OF TERESA L FLECKENSTEIN

SEE ALSO 1 3 13

HEARING:

Petition for DETERMINATION THAT PERSONAL PROPERTY AND REAL
PROPERTY BE FOUND TO BELONG TO THE ESTATE ETC

COUNSEL:

TIMOTHY WAYNE FLECKENSTEIN (PET)...BROCK, MARTIN & VOORHEES
TERESA L FLECKENSTEIN (DEC)...
KATHLEEN HEAD (DEF)...DAVID LIVINGSTONE TAUB
BRYAN M TURNER (DAVID LIVINGSTONE TAUB)

XREF: GARSS1300022 SERENA AND JOSHUA SANCHEZ

FAMRS1301184 KATHLEEN M HEAD -N- TIMOTHY W FLECKENSTEIN

GENERAL INFORMATION:

Continued from 7/1/15, 8/5/15, 1/6/16, 4/6/16, 7/13/16, 09/21/16, 11/30/16, 02/01/17, and 04/19/17. Matter is set contested. Time Estimate: one full week. Deadline for exchange: 02/28/18 by 4PM. Court made pretrial orders.

THIS CASE IS SET FOR HEARING ON Petition to Determine Estate Property; for Breach of Trust, Intentional Interference, and Conversion

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

1. Petitioner, Timothy Fleckenstein, is the surviving spouse and Administrator. Petitioner is also father and guardian of the estate of decedent's son, Tanner.
2. Petitioner alleges that though he and decedent were separated at the time of decedent's death on 12/21/12, they were still legally married. Petitioner alleges he has executed an assignment of interest entitling Tanner Fleckenstein to 100% of the estate. Need assignment of interest.
3. Petitioner alleges that in March 2010, decedent received a large medical malpractice settlement and that petitioner gave up any claim to the proceeds with the understanding that their son Tanner would be the ultimate beneficiary.
4. Petitioner alleges that decedent transferred the settlement proceeds to Respondent, Kathleen Head, for the sole purpose of holding the assets in trust for her estate and the benefit of Tanner. Kathleen Head is related as mother of decedent.

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

5. Petitioner alleges that on 4/21/10, Respondent, Kathleen Head, purchased the subject real property located in Chino, CA using the proceeds from the settlement to be held in a constructive trust for decedent's estate and for the benefit of Tanner.
6. Petitioner alleges that on 3/22/13 (after decedent's death) Respondent, Kathleen, transferred the subject real property to Bryan Turner, also named a respondent herein. Petitioner believes Bryan Turner is related as a friend of Kathleen Head.
7. Petitioner requests the Court order that the subject real property, personal property located in the residence and certain bank accounts (to be identified), be found as held in a constructive trust and should be transferred to petitioner as personal representative of the Estate.
8. Petitioner requests the Court find that the respondents, Kathleen Head and Bryan Turner, breached a fiduciary duty, acted fraudulently and interfered with petitioner's right to inherit and require respondents to account for all property so taken.
9. **Objection filed 7/30/15 by Kathleen Head; amended objections filed 11/22/16.**
10. **Objection filed 7/30/15 by Bryan Turner; amended objections filed 11/22/16.**
11. **Timothy Fleckenstein assigned his rights to Teresa's estate to Tanner Fleckenstein. Assignment filed 1/6/16**
12. No proposed order submitted with the pleadings; submit order after hearing

RECOMMENDATION:

Matter is opposed.

(sa/oc/lc/lh)

Future Hearings: 3/19/18-3/23/18: Court Trial

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 02/28/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500082

CASE NAME: MTR OF TERESA L FLECKENSTEIN

SEE ALSO 1 2 13

HEARING:

Accounting Review

COUNSEL:

TIMOTHY WAYNE FLECKENSTEIN (PET)...BROCK, MARTIN & VOORHEES
TERESA L FLECKENSTEIN (DEC)...
KATHLEEN HEAD (DEF)...DAVID LIVINGSTONE TAUB
BRYAN M TURNER (DAVID LIVINGSTONE TAUB)

XREF: GARSS1300022 SERENA AND JOSHUA SANCHEZ

FAMRS1301184 KATHLEEN M HEAD -N- TIMOTHY W FLECKENSTEIN

GENERAL INFORMATION:

Continued from 7/13/16, 09/21/16, 11/30/16, 02/01/17, 04/19/17, 06/28/17, 09/27/17 and 01/10/18.

THIS CASE IS SET FOR HEARING ON Accounting/Status Review

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

1. Letters of Administration issued to Timothy Fleckenstein, spouse, on 4/27/15, \$20,000 bond.
2. **Need** final inventory & appraisal.
3. **Need** an accounting or status report.

RECOMMENDATION:

Need to clear notes 2-3.

(sa/lc/ww/lh)

Future Hearings: 3/19/18-3/23/18: Court Trial

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

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 02/28/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500705

CASE NAME: PEGGY JO PETERSON

HEARING:

ACCOUNT OF RAYMOND D EDWARDS Account and Report of RAYMOND D EDWARDS and Petition for allowance of fees filed.

COUNSEL:

EDWARD LEE PETERSON	(PET)...JEFF GROTKE
PEGGY JO PETERSON	(DEC)...
JULIE A PETERSON	(PET)...AMY YORK GARRETT
RAYMOND D EDWARDS	(PET)...PRO/PER
CATHY S. PETERSON	(OBJ)...PRO/PER
AMY YORK GARRETT ESQ	
DEPARTMENT OF HEALTH CARE SERVICES	

Waiver of Court Fees and Costs filed by EDWARD LEE PETERSON is GRANTED
TOTAL FEES WAIVED TO DATE: \$2385.00

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN,

GENERAL INFORMATION:

Continued from 01/10/18 at request of Counsel. Court notes that the Court will approve this accounting if the verified supplement reflects that the sole asset of the estate was the real property and Raymond Edwards has disclaimed his interest to the property, has turned over the keys to Attorney Jeff Grotke, and notice/proof of service is filed.

THIS CASE IS SET FOR HEARING ON Waiver of Account and Report of Raymond Edwards, former administrator

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

1. Accounting period: 05/23/16 to 12/07/16
2. Assets on hand: \$65,000, real property only
3. Petitioner does not request statutory compensation.
4. There is an approved creditor's claim from Julie A Peterson in the amount of \$6,305.40 for funeral expenses on other costs advanced, status of which is unknown.

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

5. There is an approved creditor's claim from DHS for \$29,110.23, status of which is unknown.
6. **Supp 01/12/18 declaration alleges sole asset of the estate is real property which was disclaimed by Raymond Edwards and turned over to Attorney Jeff Grotke.**
7. No proposed Order submitted.

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing of receipt and final discharge for **01/16/19**.

(lh)

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

DATE: 02/28/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600042

CASE NAME: JOE AND ESPERANZA MAGANA REVOCABLE TRUST

HEARING:

SECOND Account and Report of ELIZABETH HERNANDEZ and Petition
for allowance of fees filed.

COUNSEL:

NICHOLAS MAGANA (PET)...JASON L GAUDY
CASSANDRA MAGANA (PET)...JASON L GAUDY
JOE MAGANA AND ESPERANZA MAGANA REVOCABLE TRUST (TRU)...
ELIZABETH HERNANDEZ (PET)...D. SCOTT DOONAN

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 2nd Trust Account Current and Report of Status of
Administration by Elizabeth Hernandez, Successor Trustee

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

1. **Need revised Order after hearing on 04/19/17 signed as to form and content by Counsel.**
2. Accounting period: 7/01/16 to 09/30/17
3. Assets on hand: \$438,200.44, cash
4. Petitioner, Elizabeth Hernandez, does not seek trustee fees at this time.
5. Petitioner alleges she is working on resolution of a creditor's claim for \$29,868.25 by Dept of Health Services. [Acct, 11/09/17, LFpg8].
6. Petitioner alleges on 03/16/17, title of the Trust parcel of real property located at 1348 Bonita Avenue, La Verne, CA, was conveyed to the Nicholas Magana Special Needs Trust, and sold on 07/28/17 with proceeds placed into an account in the name of the Nicholas Magana Special Needs Trust [pursuant to Order dated 04/17/17].
7. Petitioner settled a claim against beneficiary Cassandra Magana. Ms. Magana to pay \$22,600, of which \$5,000 was due and paid on 05/17/17, and remaining balance of \$17,600 is to be a surcharge on Cassandra Magana's beneficial interest, if any remains upon death of Nicholas Magana. If remainder interest is less than \$17,600, Cassandra will owe no deficiency to Trust. The \$17,600 shall accrue at legal rate of 10% per annum beginning 05/17/17. **See note #1.**

8. **Need** bank statement regarding ending balance of accounting per Local Rule 20-908.
9. Notice was given.
10. No proposed Order submitted. Submit after hearing

RECOMMENDATION

Need to clear notes 1 and 8. If approved and court continues jurisdiction, then set next Accounting review for **12/07/18**.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 02/28/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600812

CASE NAME: MTR OF JIMMY ROMERO

HEARING:
Accounting Review

COUNSEL:

HEATHER ROMERO (PET)...TREVOR
JIMMY ROMERO (DEC)...
MICHAEL A ROMERO (PET)...BRYAN C. HARTNELL
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP)...PRO/PER

GENERAL INFORMATION

Continued from 12/20/17 at request of Counsel to file an accounting.

THIS CASE IS SET FOR HEARING ON Accounting Review re Michael Romero

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

1. Letters of Administration issued to Michael Romero on 10/12/16 with full authority, no bond.
2. Final Inventory and Appraisal filed 02/08/17.
3. No accounting or status report of administration. Need same.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 02/28/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600941

CASE NAME: MTR OF KIM C WILLIAMS

HEARING:

PETITION FOR FINAL DISTRIBUTION Account and Report of ERIC J WILLIAMS and Petition for allowance of fees filed.

COUNSEL:

ERIC J WILLIAMS

(PET)...LAW OFFICES OF HOWARD R HAWKIN

KIM C WILLIAMS

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution on Waiver of Final Account and for Attorney Fees by Eric J. Williams (administrator)

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

1. Assets on hand: \$66,499.76, cash
2. Statutory fees of \$6,832.53, each, requested by petitioner and attorney. Calculated.
3. **Need** bank/investment statements verifying *date of death balance* and *final ending balance* per Local Rule 20-908.
4. Notice was given.
5. No proposed Order submitted. Submit after hearing.

RECOMMENDATION:

Need to clear note #3, then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge to include informal account re reserves for **03/06/19**.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 02/28/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601142

CASE NAME: MTR OF GUNTHER MAYER

HEARING:

Petition for Order Terminating Administration for Lack of Estate
Assets

COUNSEL:

GUNTHER MAYER (DEC)...

REINHOLD MAYER (PET)...SWAN CARPENTER WALLIS & MCKENZ

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Order Terminating Administration for Lack of Estate Assets by Reinhold Mayer (administrator/brother)

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

1. Reinhold Mayer was appointed administrator with full authority, no bond on 01/25/17.
2. The sole asset of the estate was a personal bank account with HFS Credit Union. On 03/20/17, Counsel for petitioner received a letter from HFD Federal Credit Union stating the account had a balance of \$111,935.48, and has named beneficiaries payable on death: Rolf Marolt and Michele Broward. Copies of correspondence from HFD Federal Credit Union are not attached as alleged. JTD.
3. As there are no assets to be administered, petitioner seeks to terminate estate and discharge administrator pursuant to Pr. C. §12251.
4. **Need** Notice of Hearing and Proof of Service as to Phillipp Mayer.
5. ~Proposed Order: 11/08/17

RECOMMENDATION

Need notice, then Court's discretion.

(lh)

Future Hearing: 4/04/18: Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 9

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

DATE: 02/28/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700991

CASE NAME: ROBERT ELLIS DUNLAP AKA ROBERT ELLIS DUNLAP III

HEARING:

Hearing re: Petition for Letters of Administration w/WA W/Full
Authority under IAEA.

COUNSEL:

RACHEL CAPATA (PET)...E. THOMAS CHAVEZ
ROBERT ELLIS DUNLAP (DEC)...

GENERAL INFORMATION:

Continued from 01/10/18 at request of Counsel. Counsel requests additional time to file petition for Letters of Special Administration. Petition to be filed by 4PM on 02/07/18. If filed by deadline, it is to be heard on 02/28/18.

THIS CASE IS SET FOR HEARING ON Petition for Probate of Will, with Will Annexed, and for Letters of Administration with **limited** authority under IAEA by Rachel Capata (daughter)

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

1. Requested bond \$50,000. Estimated net value of estate is \$320,000. JTD
2. **Need** Notice to USC Film Archives.
3. **Amended Petition for Probate of Will and for Letters of Administration with Will Annexed filed 02/01/18. However, there do not appear to be any changes within amended petition. Court to inquire.**
4. ~Proposed form Order: 10/04/17

RECOMMENDATION:

Need to clear note #2. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **05/15/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

Future hearing date: 04/05/18 – Amended Petition for Letters of Admin w/WA by Rachel Capata

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

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

DATE: 02/28/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1701182

CASE NAME: Theodore A Wright Jr

HEARING:

Hearing re: Petition for Letters of Administration w/WA W/Full
Authority under IAEA.

COUNSEL:

TAHIRA WRIGHT (PET)...MICHAEL C MADDUX
THEODORE A WRIGHT (DEC)...

GENERAL INFORMATION:

Continued from 01/10/18 at request of petitioner to clear probate notes.

THIS CASE IS SET FOR HEARING ON THIS CASE IS SET FOR HEARING ON Petition
for Probate of Will, with Will Annexed, and for Letters of Administration with **full** authority
under IAEA by Tahira Wright (daughter)

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

1. Petition requests Court waive bond; however, bond waivers by beneficiaries, Zyana Wright and Addie W. Wright, have not been filed. Also, petitioner Tahira Wright is a non-resident in New Jersey. Suggested bond \$123,423.00. JTD.
2. **Need** Proof of Subscribing Witness as will is not self-proving. Witnesses did not signed under penalty of perjury.
3. **Need** Proof of Publication.
4. ~Proposed form Order: 11/27/17

RECOMMENDATION:

Need to clear notes 2-3. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **05/08/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 11

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

DATE: 02/28/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800043

CASE NAME: MTR OF RONALD L LAWSON

HEARING:

Hearing re: Petition for Letters of Administration With
Full Authority Under IAEA

COUNSEL:

ANDREW J HAYNAL	(PET)...HARTNELL LAW GROUP
RONALD L LAWSON	(DEC)...
SURETEC INSURANCE COMPANY	(TP)...

GENERAL INFORMATION:

Ex parte orders granted 01/22/18. Andrew J. Haynal appointed Special Administrator with powers to list real property for sale. Special Administrator shall not have power to initiate Pr. C. §850 Petition. Bond required of \$20,000. Remaining amounts to be placed in blocked account.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Andrew J. Haynal, nominee

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

1. Requested bond \$20,000 posted as to general administration with remaining proceeds to be placed in blocked account. Estimated net value of estate is \$270,000.
2. Notice of Petition to Administer Estate with proof of service filed 01/26/18; however, proofs of service are incomplete at item #2 address of server. **Need same.**
3. **Need** Proof of Publication.
4. ~Proposed form Order: 01/17/18

RECOMMENDATION:

Need to clear notes 2-3. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **05/8/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 12

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

DATE: 02/28/18 TIME: 8:35 DEPT: S35P

CASE#: CIP DS1700163

CASE NAME: IN RE: WILLIE WALKER

HEARING:

Hearing Re: STATUS OF FUNDS BEING PLACED INTO THE TRUST

COUNSEL:

WILLIE WALKER

(PET)...ABIR COHEN TREYZON SALO, LLP

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON STATUS OF FUNDS BEING PLACED INTO THE TRUST

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

1. Matter set on 12/20/17, wherein, Court granted petition for compromise of disputed claim; Order signed this date. Court ordered funds to be placed into the Arc of Georgia Pooled Trust (Trustee is Gail Davis, from the South Easter Trust Company).
2. **Proof of funding filed 02/13/18.**

RECOMMENDATION

None.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 13

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

DATE: 02/28/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1500082

CASE NAME: MTR OF TERESA L FLECKENSTEIN

SEE ALSO 1 2 3

HEARING:

Hearing Re: Motion Re: Summary Judgment/Adjudication

COUNSEL:

TIMOTHY WAYNE FLECKENSTEIN (PET)...BROCK, MARTIN & VOORHEES
TERESA L FLECKENSTEIN (DEC)...
KATHLEEN HEAD (DEF)...DAVID LIVINGSTONE TAUB
BRYAN M TURNER (DAVID LIVINGSTONE TAUB)

XREF: GARSS1300022 SERENA AND JOSHUA SANCHEZ

FAMRS1301184 KATHLEEN M HEAD -N- TIMOTHY W FLECKENSTEIN

Currently under review by Legal Research.

(LR)

Future Hearings: 3/19/18-3/23/18: Court Trial

Superior Court of Calif, County of San Bernardino

Page: 14

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

DATE: 02/28/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1700271

CASE NAME: THE NINA WOOD IRREVOCABLE TRUST, DATED FEB 23, 2011

HEARING:

Hearing Re: Petition for TRUST CLAIM TO REAL PROPERTY

COUNSEL:

NORMA RUDAMETKIN (PET)...CHRISTOPHER B JOHNSON
THE NINA WOOD IRREVOCABLE TRUST (TRU)...
GARY WOOD (OBJ)...SHARON M ANDERSON

Currently under review by Legal Research.
(LR)

Notice given.
(nb)

Future Hearings: 8/29/18: Readiness Calendar
10/01/18: Court Trial

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

DATE: 02/28/18 TIME: 8:35 DEPT: S35P

CASE#: TRU PS1800021

CASE NAME: SALVATORE J SCANDURA

HEARING:

Petition for TO ESTABLISH SPECIAL NEEDS TRUST PUR SUANT TO 42 U.S.C.
SECTION 139p(d)(4)(A)

COUNSEL:

LEONARD M SCANDURA (PET)...BUXBAUM & CHAKMAK
SALVATORE J SCANDURA SPECIAL NEEDS TRUST (PET)...

Currently under review by Legal Research.

(LR)

Superior Court of Calif, County of San Bernardino

Page: 16

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIPS

DATE: 02/28/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS0700203

CASE NAME: MTR OF EDITHA M CLARKE

HEARING:

Accounting Review

COUNSEL:

DORA D CLARKE-PINE	(CPE/CTE)...JENNIFER M DANIEL
DARCY D CLARKE	(CPE)...JENNIFER M DANIEL
EDITHA M CLARKE	(CEP)...
DORA D CLARKE-PINE	(CE)...DENNIS M SANDOVAL
DARCY D CLARKE	(CE)...DENNIS M SANDOVAL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Waiving 4th Account entered 03/28/17.
2. Accounting or waiver now due.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 02/28/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1400372

CASE NAME: MTR OF EDWARD DAVIS

SEE ALSO 18

HEARING:

Hearing Re: OSC RE SURCHARGE ON TIFFANY DAVIS OF \$2,500.00

COUNSEL:

TIFFANY DAVIS	(CPE)...JEFFREY LISS
EDWARD DAVIS	(CEP)...
DIANE VENABLE	(OBJ)...PRO/PER

Waiver of Court Fees and Costs filed by TIFFANY DAVIS is GRANTED
Waiver of Court Fees and Costs filed by DIANE VENABLE is GRANTED

XREF: PROPS1500278 EDWARD DAVIS

GENERAL INFORMATION

Continued from 05/26/16, 08/09/16 and 10/26/16. Tiffany Davis to personally appear.
Letter to judge on 10/13/16 not accepted as accounting.

Continued from **01/18/17**. Mitchell Roth relieved as counsel.

Continued from **04/12/17**. Tiffany David ordered to return and filed account by 06/19/17.

Continued from 07/19/17. Matter is continued to 11/29/17; Court notes that the deadline for the filing of complete accounting is 4PM on 10/30/17. Court makes admonishment that if accounting is not filed by the deadline, that Tiffany Davis will be surcharged the amount of \$2,500.

Continued from 11/29/17. Court continues hearing to 02/28/18 and sets and additional OSC re surcharge of \$2,500 on Tiffany Davis for same date. Court notes it will impose and additional surcharge of \$2,500 if Tiffany Davis fails to file the appropriate accounting before hearing on 02/28/18.

THIS CASE SET FOR HEARING ON OSC re Surcharge on Tiffany Davis.

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

1. OSC set on 02/18/16 when there was no appearance or notes cleared. See next matter.
2. Note: no accounting filed as of examiner's review.

RECOMMENDATION

Court's discretion re OSC. No bonding company to notice.

(lc/nb/lc/lh)

Superior Court of Calif, County of San Bernardino

Page: 18

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

DATE: 02/28/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1400372

CASE NAME: MTR OF EDWARD DAVIS

SEE ALSO 17

HEARING:

FIRST AND FINAL Account and Report of TIFFANY DAVIS and Petition
for allowance of fees filed.

COUNSEL:

TIFFANY DAVIS	(CPE)...JEFFREY LISS
EDWARD DAVIS	(CEP)...
DIANE VENABLE	(OBJ)...PRO/PER

Waiver of Court Fees and Costs filed by TIFFANY DAVIS is GRANTED
Waiver of Court Fees and Costs filed by DIANE VENABLE is GRANTED
TOTAL FEES WAVIED TO DATE: \$1440.44

XREF: PROPS1500278 EDWARD DAVIS

See notes on previous matter #17.

(lh)

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

DATE: 02/28/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600142

CASE NAME: MTR OF BERNICE GRISSOM

HEARING:

Accounting Review/ Waiver of 1st and Final Acct

COUNSEL:

LOYCE WILLIS (CPE)...LAW OFFICES OF EUGENE S. ALKAN
BERNICE GRISSOM (CEP)...CRAIG M PARKER

GENERAL INFORMATION

Continued from 09/20/17.

Continued from 11/01/17. Due to weather conditions in Texas and illness of Loyce Willis, Counsel was unable to retrieve and file all necessary documents for hearing this date. Counsel's request for continuance is granted. Counsel is ordered to file an [amended] accounting by 4PM on 04/24/18. If accounting is file on time, Clerk's office is ordered to set Accounting Review date for 02/28/18 at 9:30AM in Dept S35P.

THIS CASE SET FOR HEARING ON Waiver of 1st and Final Account, Waiver of Inventory and Appraisal, and Petition for Allowance of Fees by Loyce Willis, daughter.

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

1. Accounting period not stated. Accounting period shall begin at temporary appointment to death; 01/02/17 and post death accounting Pr.C. § 2620(b). **Need same.**
2. Assets on hand not stated. **Need same.**
3. Petitioner seeks waiver of accounting as petitioner is sole distributee as administrator in probate case in Los Angeles 17STPB00775; however, this is not sufficient cause to waive a conservatorship accounting as the estate does not qualify for a waiver. Estate assets are approximately \$580,000 per bond and blocked accounts.
4. **Need** bank statements covering period prior to and end of accounting period.
5. Petitioner seeks waiver of Inventory and Appraisal as petitioner resides in Texas. However, this is not sufficient cause for a waiver. **Need** final Inventory & Appraisal per Pr.C. § 2610. Court has discretion not to require Inventory and Appraisal and require an accounting covering only those assets of the estate which Conservator has possession of Pr.C. § 2633. JTD

6. No proposed order.

RECOMMENDATION

Need proper amended accounting. If approved, set hearing on the filing of receipts and final discharge for **03/06/19**.

(lc/lh)

Superior Court of Calif, County of San Bernardino

Page: 20

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

DATE: 02/28/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700131

CASE NAME: MTR OF JIMMIE V SMITH

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of FRED SMITH

COUNSEL:

FRED SMITH (CPE)...JEANNE E KENNEDY
JIMMIE V SMITH (CEP)...MITCHELL I ROTH

XREF: PROPS1500081 *MTR OF THE JVS TRUST*

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Fred Smith was appointed Conservator of the person and estate of Jimmie V. Smith on 07/26/17, \$120,000 bond.
2. Notification of Conservatee's rights and Determination of Conservatee's Appropriate Level of Care filed 02/07/18.
3. Care Plan in accord filed 02/13/18.
4. Partial Inventory and Appraisal filed 12/06/17. Supporting bank statement for Bank of the West account is illegible. **Need** verified supplement with copy of supporting bank statement, or obtain letter from financial institution verifying balance as of appointment.
5. **Need** proof of service Inventory and Appraisal including Instructions for Objections per Pr. C. §2610.

RECOMMENDATION

Inquire status.

(lh)

Future Hearing: 10/03/18: Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 21

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

DATE: 02/28/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700153

CASE NAME: ANABEL MARTINEZ-ZAVALA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MARIA E ZAVALA

COUNSEL:

MARIA E ZAVALA (CP)...
ANABEL MARTINEZ-ZAVALA (CTP)...JEANNE E KENNEDY

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Maria Zavala appointed Limited Conservator of the person of Anabel Martinez-Zavala.
2. Notification of Conservatee's Rights; Determination of Conservatee's Appropriate Level of Care; and Care Plan filed 08/29/17.

RECOMMENDATION

None.

(lh)

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

DATE: 02/28/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700413

CASE NAME: DeChauncey DeRey Duncantell Turner Downtain

HEARING:
Petition for Appointment of Conservator

COUNSEL:

SHEILA DOWNTAIN (CP)...OLIVER M RILEY
DECHAUNCEY DEREY DUNCANTELL (CTP)...WALTER T. MOORE
KATHRYN FERGUSON (CP)...OLIVER M RILEY

XREF: CONPS1700417 SERGIO JOSEPH DOWNTAIN
CONPS1700418 ALISON MICHELLE DOWNTAIN

GENERAL INFORMATION

Continued from 12/20/17 at request of Counsel. Attorney Walter Moore appointed for Dechauncey Duncantell. Notice given by Judicial Assistant.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Sheila Downtain (mother) and Kathryn Ferguson (mother's spouse)

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

1. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, consent/withhold consent to marriage, limit right to contract, control social/sexual contacts, and make decisions re education. JTD
2. Petitioner seeks medical powers. Capacity Declaration filed 11/17/17.
3. Proposed conservatee is developmentally disabled. **Need report of Counsel Moore.**
4. Proposed conservatee is developmentally disabled. **IRC report filed 12/15/17.**
5. Proof of Completion of the Conservatorship Training Class filed 12/08/17.
6. Return of Citation filed 12/19/17
7. CI Report filed 12/11/17.
8. ~Proposed Form Order: 11/02/17

RECOMMENDATION

Need to clear note #3. If approved, set hearing for Compliance Review for **10/03/18** 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)

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

DATE: 02/28/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700462

CASE NAME: MTR OF MOHKAM TUT

HEARING:
Petition for Appointment of Conservator

COUNSEL:

SURJIT TUT	(CP)...PRO/PER
BALBIR TUT	(CP)...PRO/PER
MOHKAM TUT	(CTP)...
TANJINDER KAUR TUT	(CP)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Tanjinder Tut (sister) and Surjit Tut (mother)

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

1. It appears proposed conservatee is developmentally disabled. Does Court wish to deem this petition a petition for limited conservatorship? **JTD**
2. Proposed conservatee appears to be developmentally disabled and this is not a petition for Limited Conservatorship:
 - a. Court may wish to appoint counsel and require report for proposed conservatee per Pr.C. §1470. **JTD**
 - b. An IRC report is optional per Pr.C. 1827.5(b). Does court wish to require? **JTD**
3. Petitioner seeks medical powers. Capacity Declaration filed 01/12/18.
4. Proof of Completion of Certificate of Completion of the Conservatorship Training Class filed 01/20/18.
5. **CI Report filed 02/22/18.**
6. List of required contacts is missing Tarsem Caur (mgm) and Sawan Tut (pgm). **Need** completed form.
7. Amended Notice of Hearing filed 01/26/18; however, Notice does not include co-petitioner Tanjinder in item #1. **Need corrected Notice and proof of service.**
8. Return of Citation with proof of service filed 01/26/18.

9. ~Proposed Form Order: 12/21/17

RECOMMENDATION

Need to clear notes 6-7, then Court's discretion. If approved, set hearing for Compliance Review for **10/03/18** 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)

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

DATE: 02/28/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800011

CASE NAME: MTR OF CARL COMBS THOMAS

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CARRIE THOMAS	(CP)...PRO/PER
HOWARD THOMAS JR	(CP)...PRO/PER
CARL COMBS THOMAS	(CTP)...

GENERAL INFORMATION

Ex parte orders granted 01/19/18. Carrie Thomas and Howard Thomas, Jr appointed Temporary Conservators of the person only.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Carrie Thomas, mother

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

1. Proposed conservatee is developmentally disabled. It appears a Limited Conservatorship is appropriate. Does Court wish to deem this a Petition for Limited Conservatorship? **JTD**
2. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, Court may wish to appoint counsel and require report for proposed conservatee per Pr.C. §1470. **JTD**
3. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, an IRC report is optional per Pr.C. 1827.5(b). Does court wish to require? JTD
4. Petitioner seeks medical powers. **Capacity Declaration filed 02/14/18; however, item #7b is missing physician's initials, and signatures are not dated. Need completed form.**
5. **Need** Court Investigator report.
6. **Need** Certificates of Completion of the Conservatorship Training Class.
7. Return of Citation filed 01/16/18.

8. Petition, item #1a does not list Howard Thomas Jr (father) as a proposed co-conservator; however, he signed the petition and it appears he seeks appointment as a co-conservator. **JTD**
9. Petition, item #11 list of relatives does not include parents/petitioners. **JTD**
10. ~Proposed Form Order: 01/12/18

RECOMMENDATION

Need to clear notes 4-6. If approved, set hearing for Compliance Review for **10/03/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5

(lh)

Superior Court of Calif, County of San Bernardino

Page: 25

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

DATE: 02/28/18 TIME: 9:30 DEPT: S35P

CASE#: SC SS02302

CASE NAME: MTR RE JENNIFER JOANNE MCKINNEY

HEARING:
Accounting Review

COUNSEL:
DAN G MCKINNEY (CPE)...REID & HELLYER
JENNIFER JOANNE MCKINNEY (CEP)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order dispensing with 5th account entered 05/25/17 for period ending 12/31/16.
2. **Need** accounting waiver of account for period 01/01/17 through 12/31/17.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 26

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **MISC.**

DATE: 02/28/18 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1500701

CASE NAME: FRANK PELLEGRINO JR

SEE ALSO 27 28

HEARING:

Hearing Re: PTN BY D. NEUHAUS FOR ORDER TERM INSOLV TRUST

COUNSEL:

FRANK PELLEGRINO	(PET)...PRO/PER
FRANK PELLEGRINO JR	(DEC)...
MARY LOUISE PELLEGRINO	(PET)...PRICE LAW FIRM, APC
DORIS NEUHAUS	(PET/OBJ)...J PATRICK RAGAN

Waiver of Court Fees and Costs filed by FRANK PELLEGRINO, MARY LOUISE PELLEGRINO & DORIS NEUHAUS is GRANTED

XREF: FAMSS1703685 *MARY L PELLEGRINO -N- FRANK PELLEGRINO JR*

Currently under review by legal research

(LR)

NOTICE:

30 days' notice filed.

Future Hearings: 3/07/18: Mediation Settlement Conference
3/20/18: 2nd Amended Accounting

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

Superior Court of Calif, County of San Bernardino

Page: 27

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

DATE: 02/28/18 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1500701

CASE NAME: FRANK PELLEGRINO JR

SEE ALSO 26 28

HEARING:

Hearing Re: Issues Conference re Creditor's Claim

COUNSEL:

FRANK PELLEGRINO	(PET)...PRO/PER
FRANK PELLEGRINO JR	(DEC)...
MARY LOUISE PELLEGRINO	(PET)...PRICE LAW FIRM, APC
DORIS NEUHAUS	(PET/OBJ)...J PATRICK RAGAN

Waiver of Court Fees and Costs filed by FRANK PELLEGRINO, MARY LOUISE PELLEGRINO & DORIS NEUHAUS is GRANTED

XREF: FAMSS1703685 *MARY L PELLEGRINO -N- FRANK PELLEGRINO JR*

No notes—JTD

Future Hearings: 3/07/18: Mediation Settlement Conference
3/20/18: 2nd Amended Accounting

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

DATE: 02/28/18 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1500701

CASE NAME: FRANK PELLEGRINO JR

SEE ALSO 26 27

HEARING:

Hearing Re: VERIFIED PTN FOR JUDGMENT ON CREDITOR'S CLAIM

COUNSEL:

FRANK PELLEGRINO	(PET)...PRO/PER
FRANK PELLEGRINO JR	(DEC)...
MARY LOUISE PELLEGRINO	(PET)...PRICE LAW FIRM, APC
DORIS NEUHAUS	(PET/OBJ)...J PATRICK RAGAN

XREF: FAMSS1703685 *MARY L PELLEGRINO -N- FRANK PELLEGRINO JR*

GENERAL INFORMATION

Matter set on 01/10/18 for issues conference to determine which issues will be addressed at contested hearing. Court set mediation date for 03/07/18; vacated trial dates and pretrial orders.

THIS CASE IS SET FOR HEARING ON Petition [filed 07/25/17] for Judgment on Creditor's Claim by Mary Louise Pelligrino (former spouse of decedent)

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

1. Petitioner, Mary Lourise Pelligrino (former spouse of decedent), seeks enforcement of judgment against Respondent, Doris Neuhaus (successor trustee of Frank Paul Pelligrino Revocable Trust) for \$182,693 in child support arrearages accrued by decedent.
2. Petitioner, Mary Lourise Pelligrino, presented a creditor's claim on 08/16/16 setting forth matters on which action is based. Said claim was rejected by Respondent, Doris Neuhaus, on 05/01/17. [See petition, 07/25/17, LFpgs 20-33; 73].
3. Petitioner, Mary Pelligrino, alleges Respondent, Doris Neuhaus, as Trustee has violated her fiduciary duty owed to Petitioner as a potential creditor as Respondent has engaged in the improper transfer of trust assets to avoid payment of creditor's claim. Respondent continues to operate the business known as "Crazy Frank's Carpets" at a profit and has failed to render a true verified accounting. Petitioner Mary Pelligrino has requested a true and correct accounting to which Respondent Doris Neuhaus refuses to respond.

4. Petitioner Mary Pelligrino seeks instruction of the Court related to Respondent's actions as successor trustee of the Trust and Respondent's refusal to pay sum of \$182,693 in arrearages accrued by Decedent.
5. Petitioner seeks judicial determination of her rights and duties as a creditor, and declaration as to whether Respondent must pay sum of \$182,693.
6. **Need** Notice of Hearing and proof of service.
7. No proposed Order submitted.

RECOMMENDATION

Need notice, then Court's discretion.

(lh)

Future Hearings: 3/07/18: Mediation Settlement Conference
3/20/18: 2nd Amended Accounting

Superior Court of Calif, County of San Bernardino

Page: 29

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

DATE: 02/28/18 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1501011

CASE NAME: LUPE G. FLIN

HEARING:

Hearing Re: COURT TRIAL (THIRD DAY)

COUNSEL:

GARY S WARD	(PET)...	FRIDLEY LAW FIRM
LUPE G FLIN	(DEC)...	
SHARLEEN MALDONADO-WARD	(PET)...	MICHAEL C MADDUX
CARMEN HERNANDEZ	(OBJ)...	GILBERT M GUTIERREZ

Waiver of Court Fees and Costs filed by CARMEN HERNANDEZ is GRANTED

Waiver of Court Fees and Costs filed by SHARLEEN MALDONADO-WARD is GRANTED

Court trial—no notes—JTD

Future Hearings: 3/01/18-3/02/18: Court Trial

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

PROBATE

DATE: 02/28/18 TIME: 8:30 DEPT: S36P

CASE#: PRO DS1000295

CASE NAME: THE JACK A. JOHNSON TRUST

HEARING:

Petition to Approve Sixth Account and Report of WELLS FARGO BANK
and Petition for allowance of fees filed.

COUNSEL:

THE JACK A. JOHNSON TRUST

(TRU)...

WELLS FARGO BANK

(PET)...THE GROSSMAN LAW FIRM

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 6th Account Current and Petition for fees by Wells Fargo Bank, Trustee

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

1. Accounting period covers 07/01/15 to 06/30/17
2. Assets on hand **\$775,073.71** consisting of \$22,958.96 in cash and the balance in real property and securities.
3. Petitioner requests confirmation of fees taken in the amount of **\$26,010.85**. Periodic fees calculated on a tiered market rate. Calculated.[Acct,12/19/17, LFpg80-86]. **JTD**
4. Attorney requests fees of **\$1,225** billed at \$350/hour for 3.50 hours. Itemized [Acct, 12/19/17, LFpg88]. **JTD**].
5. Petitioner requests future accounts to be performed on a biennial cycle. **JTD**
6. Notice was given.
7. No proposed Order submitted. Submit after hearing.

RECOMMENDATION:

Court's discretion. If approved, Court may wish to set the next hearing re Accounting Review for **08/29/18 (if one year)** or **08/28/19 (if two years)**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 02/28/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS0600334

CASE NAME: MTR OF ERIN ELIZABETH WILSON

SEE ALSO 3

HEARING:

Motion Re: TO BE RELIEVED AS COUNSEL

COUNSEL:

SUSANNE CHRISTENSEN (PET)...DIANA J. CARLONI

ERIN ELIZABETH WILSON (DEC)...

CLIFFORD BRACE (OBJ)...HODGE & BARTOUMIAN

GENERAL INFORMATION:

Continued from 08/15/17. No appearance. Notice by Judicial Assistant.

Continued from 10/11/17. No appearance. Court continues matter to the accounting review date.

Continued from 01/10/18. No appearance. Court continued to 02/28/18. Notice given by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Motion to be relieved by Counsel by Stanley W. Hodge ["Petitioner"].

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

1. Declaration in support of motion filed 06/15/17. However, **need** mandatory form Declaration [MC-052].
2. Petitioner, Stanley W. Hodge, makes this motion to be relieved as counsel under Code of Civil Procedure section 284(2) instead of filing consent under section 284(1) and alleges all communication has broken down between the client and attorney and it is impossible to continue to appear for Mr. Brace.
3. ~Proposed Form Order 06/07/17.

RECOMMENDATION:

Need to clear note 1, then Court's discretion.

(nb/lh)

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 02/28/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS0600334

CASE NAME: MTR OF ERIN ELIZABETH WILSON

SEE ALSO 2

HEARING:

Accounting Review

COUNSEL:

SUSANNE CHRISTENSEN (PET)...DIANA J. CARLONI

ERIN ELIZABETH WILSON (DEC)...

CLIFFORD BRACE (OBJ)...HODGE & BARTOUMIAN

GENERAL INFORMATION

Continued from 10/11/17. Bankruptcy Court to review Omnibus Motion.

Continued from 01/10/18. No appearance.

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 Susanne Christensen, daughter, on 03/14/07; full authority, no bond.
2. Previous status report approved on 06/12/17.
3. Notice of hearing and proof of service filed; however, a status report has yet to be filed.
4. Declaration of Diana Carloni filed 09/20/17 regarding pending Omnibus Motion with Bankruptcy Court.
5. **Need** accounting or status report.

RECOMMENDATION

Inquire status of accounting.

(ww/lh)

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

DATE: 02/28/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1301064

CASE NAME: MTR OF CAROL JEAN DAHMNS SPECIAL NEEDS TRUST

HEARING:

Third Account and Report of ROBERT L DULIN and Petition for allowance of fees filed.

COUNSEL:

SANWA BANK CALIFORNIA	(PET)...BURGH BALIAN & BERGSTEIN
THE CAROL JEAN DAHMS SPECIAL NEEDS TRUST (TRU)...	
BANK OF THE WEST	(PET)...RANDOLPH M SHARON
ANA MARIA JIMENEZ	(PET)...RANDOLPH M SHARON
ROBERT L DULIN	(PET)...JEANNE E KENNEDY
WILLIAM SORENSON	(OBJ)...JEANNE E KENNEDY

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 3rd Account Current and Report of Successor Trustee of SNT and Petition for Fees, Reimbursement, and Increase in Bond

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

1. Account period covers 06/08/16 to 10/05/17
2. Assets on hand \$119,727.32 in cash.
3. Petitioner requests confirmation of fees already paid at the rate of \$16/hour, and for reimbursement of fuel while driving conservatee to various locations totaling **\$2,589.55**. Itemized. [Acct, 12/20/17, LFpg13, 23, 29,31 **JTD**
4. Petitioner requests confirmation of reimbursement made in the amount of **\$6,658.68** for costs advanced to the beneficiary. Itemized [Acct, 12/20/17, LFpg13]. Two reimbursement payments include trustee's airfare to North Carolina/Florida on 08/01/16 and Puerto Vallarta on 01/18/17 while accompanying beneficiary, along with several meals during vacation periods. **JTD**
5. Attorney requests fees of **\$3,818.75** billed for attorney/paralegal services at \$300/\$275/\$150/\$125 per hour. Itemized [Acct, 12/20/17, LFpg85-88]. **JTD**
6. Bond is currently set at \$20,000. **Petitioner requests bond increase totaling \$110,000** per calculation [Acct, 12/20/17, LFpg91]. Appears sufficient. **JTD**
7. Notice was given.

8. ~Proposed order: 12/20/17

RECOMMENDATION:

Court's discretion. If approved, set hearing re next Accounting Review for **12/05/18**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 02/28/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400701

CASE NAME: Simon Sybrandy Family Trust

HEARING:
Trial Setting Conference

COUNSEL:

SIDNEY SYBRANDY	(PET)...THOMPSON & COLEGATE
SIMON SYBRANDY FAMILY TRUST	(TRU)...
MARILYN SYBRANDY OLISLAGERS	(PET)...E. JOAN NELMS
IDA SYBRANDY	(PET/OBJ)...WILLIAM M NASSAR

XREF: CONPS1400242 *IDA SYBRANDY*

Future Hearings: 4/25/18: Trust Accounting, Hearing Re: Sybrandy Investment Accounting

TSC—no notes—JTD

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 02/28/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600485

CASE NAME: MTR OF LOYOLA EDITH LANCE

VACATED

HEARING:

Accounting Review

COUNSEL:

HOWARD JAMES LANCE JR (PET)...JT LEGAL GROUP, APC
LOYOLA EDITH LANCE (DEC)...
DEPARTMENT OF HEALTH CARE SERVICES (TP)...PRO/PER

GENERAL INFORMATION

Continued from **11/30/17**.

Continued from 01/04/18. No appearance. Hearing continued at request of Court as parties are not present.

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 **Howard Lance Jr**, brother, on 10/20/16; full authority, no bond. Howard passed away.
2. Letters of Successor Administration issued to **Howard Lance, III**, nephew, on 10/30/17; full authority \$20,000 bond.
3. Final Inventory and Appraisal filed.
4. **Need** account for deceased administrator. Court may wish to require counsel to file accounting per Pr.C.§10953(c).

RECOMMENDATION

Inquire status of accounting.

(lc/lh)

Future Hearing: 11/15/18 *Accounting Review for **Successor Howard Lance, III, nephew***

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 02/28/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700686

CASE NAME: MTR OF NATALIA GUERRA

HEARING:

Hearing Re: Status on Mediation

COUNSEL:

ANGELICA GUERRA	(PET)...E. MARIE HENNING
NATALIA GUERRA	(DEC)...
JUAN D GUERRA	(TP)...JOHN THEODORE DEAN

XREF: UDFS1704646 GUERRA VS ORDONES

Same Day Hearing: Mediation Settlement Conference @8:30 in dept. S34

Status—no notes—JTD

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 02/28/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701060

CASE NAME: TERESITA ANGELES BOWERS

SEE ALSO 9 10

HEARING:

Motion Re: Demurrer to Pet. for ordr confirming Successor
Trustee etc Filed by Petitioner SHERYLL A. BAUTISTA

COUNSEL:

MARIA THRIXIE ANGELES GUZMAN	(PET)...PRO/PER
TERESITA ANGELES BOWERS	(DEC)...
MARIA THRIXIE ANGELES GUZMAN	(PET)...PRO/PER
MARIA RHEA ANGELES FRANCISCO	(OBJ)...PRO/PER
SHERYLL A. BAUTISTA	(SIMONIAN LAW, APC)

Waiver of Court Fees and Costs filed by MARIA THRIXIE ANGELES GUZMAN is GRANTED
Waiver of Court Fees and Costs filed by MARIA RHEA ANGELES FRANCISCO is GRANTED

Currently under review by Legal Research

(LR)

Superior Court of Calif, County of San Bernardino

Page: 9

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

DATE: 02/28/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701060

CASE NAME: TERESITA ANGELES BOWERS

SEE ALSO 8 10

HEARING:

Petition for ORDER CONFIRMING SUCCESSOR TRUSTEE AND TRUST
ASSETS

COUNSEL:

MARIA THRIXIE ANGELES GUZMAN	(PET)...PRO/PER
TERESITA ANGELES BOWERS	(DEC)...
MARIA THRIXIE ANGELES GUZMAN	(PET)...PRO/PER
MARIA RHEA ANGELES FRANCISCO	(OBJ)...PRO/PER
SHERYLL A. BAUTISTA	(SIMONIAN LAW, APC)

Waiver of Court Fees and Costs filed by MARIA THRIXIE ANGELES GUZMAN is GRANTED
Waiver of Court Fees and Costs filed by MARIA RHEA ANGELES FRANCISCO is GRANTED

Currently under review by Legal Research

LR

NOTICE:

Need **Notice of Hearing** to named successor trustee Consolacion Santiago, alternate successor Irma Bacarella, Flordeliza de Guzman, sister; and Rebecca Legaspi; sister; Maria Rhea Francisco, daughter; Maria Theresa Francisco Ilar, daughter; Manille Francisco, granddaughter; and Romeo Raphael Francisco, grandson.

Need 30 days' notice with copy of petition by personal service per Pr.C. § 851 on current owner of property at issue, Sheryll Bautista. Note requirements of contents of notice described in Pr. C. §851(c)

(ww/lh)

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

DATE: 02/28/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701060

CASE NAME: TERESITA ANGELES BOWERS

SEE ALSO 8 9

HEARING:

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

COUNSEL:

MARIA THRIXIE ANGELES GUZMAN	(PET)...PRO/PER
TERESITA ANGELES BOWERS	(DEC)...
MARIA THRIXIE ANGELES GUZMAN	(PET)...PRO/PER
MARIA RHEA ANGELES FRANCISCO	(OBJ)...PRO/PER
SHERYLL A. BAUTISTA	(SIMONIAN LAW, APC)

GENERAL INFORMATION

Letters of special administrator issued to Maria Guzman on 10/30/17, no bond.

Continued from 01/22/18. Counsel request a continuance as a demurrer has been filed.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Maria Guzman, daughter

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

1. Petitioner requests that bond is to be determined. The estate consists of **negative** \$125,000 due to encumbrances on real property.
2. **Need** Notice of Petition to Administer Estate to the Consulate of the Philippines as heir Maria Ilar is a resident of the Phillipines.
3. **Need** Request to Excuse Notice and Due Diligence Declaration (local form) as to Maria Rhea Francisco.
4. ~Proposed Form Order:10/24/17

RECOMMENDATION

Need to clear notes 2-3. Court's discretion re bond. If approved, set Accounting/Status Review **05/08/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908. (ww/lh)

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

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

DATE: 02/28/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800084

CASE NAME: Dorothy May Buchholz

HEARING:

Petition to determine succession to Real Property

COUNSEL:

BRADLEY R BUCHHOLZ (PET)...FULLERTON LEMANN SCHAEFER & DO
CATHLEEN B HENDRICKS (PET)...FULLERTON LEMANN SCHAEFER & DO
DOROTHY MAY BUCHHOLZ(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Bradley R. Buchholz (son) and Cathleen Hendricks (daughter)

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

1. Petitioners seeks 100% interest, 50% each; in decedent's 100% interest in real property per the will.
2. Notice given.
3. ~Proposed Form Order: 01/26/18

RECOMMENDATION

Court's discretion.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 12

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

DATE: 02/28/18 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1600218

CASE NAME: ANA L MEDINA REVOCABLE TRUST

HEARING:

Petition for order confirming trust assets

COUNSEL:

MARCOS MEDINA (PET)...JACK B. OSBORN
2008 ANA L MEDINA REVOCABLE TRUST (TRU)...PRO/PER

Currently under review by Legal Research.

(LR)

Notice of Hearing filed 01/23/18 does not comply with Pr. C. §851(c). Notice is missing a description of subject property and a statement advising any interested person that they may file a response. **Need proper Notice of Hearing and proof of service.**

(lh)

Superior Court of Calif, County of San Bernardino

Page: 13

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

DATE: 02/28/18 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1600756

CASE NAME: ROBERT EDWARD MILLER

VACATED

HEARING:

Motion Re: to compel contestant's responses to form interrogatories

COUNSEL:

RYAN EDWARD MILLER (PET)...FULLERTON LEMANN SCHAEFER & DO
ROBERT EDWARD MILLER (DEC)...
W.A.(SAM) HLAVATY (PET)...THOMPSON & COLEGATE
ROBERT WILLIAM MILLER IV (OBJ)...MITCHELL I ROTH

Currently under review by Legal Research.

(LR)

Future Hearings: 5/31/18: Readiness Calendar
6/11/18: Court Trial

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

CONSERVATORSHIPS

DATE: 02/28/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS0900044

CASE NAME: ROGER DURHAM

HEARING:

Fourth and Final Account and Report of AVALEE COHEN and Petition for allowance of fees filed.

COUNSEL:

AVALEE COHEN	(PCR/CPE/TP)...BRYAN C HARTNELL
ROGER DURHAM	(PCE/CEP)...SHERRI L KASTILAHN
SHERRI L KASTILAHN	(PET)...SHERRI L KASTILAHN

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Fourth and Final Account and Report of Conservator and Petition for Allowance of Fees and Distribution by Avalee Cohen

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

1. Pre-death accounting period: 04/03/15 to 10/08/17
2. Post-death accounting period: 10/09/17 to 11/03/17
3. Assets on hand \$99,008.67, cash
4. Attorney seeks compensation of **\$18,112.50** for 107 hours at \$250-\$425 per hour for Attorney services and \$50-\$125 per hour for paralegal services. Itemized. [Acct, 01/24/18, LFpgs27-38]. **JTD**
5. Petitioner is seeking fees of **\$13,000** for 208 hours at \$45/hour. **Need** itemization of services and justification of proposed hourly rate.
6. Petitioner is requests exoneration of bond nunc pro tunc to 10/08/17; however, bond may not be exonerated until filing of receipts and entry final discharge and order.
7. Notice was given.
8. Proposed Order submitted 01/24/18 provides for exoneration of bond.

RECOMMENDATION

Need to clear note #5. If approved, set hearing on final discharge for **03/06/19**.

(lh)

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

DATE: 02/28/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS0900248

CASE NAME: MICHAEL WYHOWANEC

HEARING:
Accounting Review

COUNSEL:

KIMBERLY L. TRAUT	(PCR/CPE)...HARTNELL LAW GROUP
MICHAEL WYHOWANEC	(PCE/CEP)...MARK J. FLORY
MARK J. ANDREW FLORY	(PET)...JAMES B CHURCH & ASSOCIATES
LIBERTY MUTUAL INSURANCE	(TP)...PRO/PER

GENERAL INFORMATION

Continued from **06/22/17 and 07/12/17.**

Continued from **09/20/17 to file accounting.**

Continued from 12/13/17.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 5th Waiver of Account for Tracy West, mother, approved on 10/19/16.
2. **Need** 6th Account beginning with 01/10/16.

RECOMMENDATION

Inquire status of accounting.

(lc/ww/lh)

Superior Court of Calif, County of San Bernardino

Page: 16

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

DATE: 02/28/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700445

CASE NAME: NOHEMY BECERRA

HEARING:
Petition for Appointment of Conservator

COUNSEL:

MARIA H BACERRA (CP)...PRO/PER
NOHEMY BECERRA (CTP)...PRO/PER

GENERAL INFORMATION

Continued from 01/10/18 to clear probate notes. Notice to be given by Attorney Sandy Turner.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Maria Becerra (sister)

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

1. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract, and make decisions re education. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Proposed conservatee is developmentally disabled. **Report of Counsel Turner filed 01/04/18.**
4. Petitioner seeks medical powers. Capacity Declaration filed 01/05/18; however, caption is incomplete as to purpose of form; item #4 is incomplete as to name of conservatee, date conservatee was last seen by physician, and whether conservatee is a regular patient. **Need 2nd amended Capacity Declaration.**
5. Proposed conservatee is developmentally disabled. **Need IRC report. IRC letter filed 01/08/18 requesting 30-day extension. JTD**

6. Return of Citation filed 12/21/17; however, proof of personal service indicates petitioner served proposed conservatee Nohemy Bacerra. **Need proper personal service by a non-party.**
7. CI Report filed 01/03/18.
8. Notice of Hearing filed 12/21/17.
9. Proof of Completion of the Conservatorship Training Class filed 01/04/18.
10. ~Proposed Form Order: 12/07/17

RECOMMENDATION

Need to clear notes 4-6. If approved, set hearing for Compliance Review for **10/03/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 17

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

DATE: 02/28/18 TIME: 9:30 DEPT: S36P

CASE#: PRO PS1600334

CASE NAME: R NEWBERRY SPECIAL NEEDS TRUST

HEARING:

Petition for SUBMITTED JUDGMENT TO EXECUTE SPECIAL NEEDS
TRUST

COUNSEL:

ROBERT LEE NEWBERRY II (PET)...DIANA J CARLONI
R NEWBERRY SPECIAL NEEDS TRUST (TRU)...

No notes—JTD

(LR)

Superior Court of Calif, County of San Bernardino

Page: 18

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **MISC.**

DATE: 02/28/18 TIME: 1:30 DEPT: S36P

CASE#: PRO PS1400136

CASE NAME: Evelyn Joyce Murray

VACATED

HEARING:

Court Trial set for PETITION FOR PROBATE of KIMBERLY PATRICE MURRAY

COUNSEL:

VINCENT EUGENE MURRAY	(PET)...THOMAS W DOMINICK
EVELYN JOYCE MURRAY	(DEC)...
KIMBERLY PATRICE MURRAY	(PET)...PRO/PER
KIMBERLI MURRAY	(TP)...BRENT D GRIDER

Future Hearings: 3/01/18: Court Trial

3/05/18: Motion to be Relieved as Counsel

Court trial—no notes—JTD

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 02/28/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1200099

CASE NAME: RUTH M SNYDER

HEARING:

Petition for termination of further proceedings and for discharge

COUNSEL:

GARY R SNYDER

(PET)...JACK B OSBORN / E JOAN NELMS

RUTH M SNYDER

(DEC)...

DANIEL SNYDER

(BEN)...THOMAS C. WATTS

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for termination of further proceedings

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

1. Letters of Administration with will annexed were issued to Gary R. Snyder on 09/04/13 with full authority, no bond.
2. Counsel alleges this is a no asset estate. On 12/05/14, Administrator filed a Petition to Determine Ownership of Trust property per Pr. C. §850, seeking an Order transferring property to the estate. Petition was dismissed on 08/28/15, and as a result there are no assets to administer.
3. Notice was given.

RECOMMENDATION:

Court's discretion.

(nb/lh)

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 02/28/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500717

CASE NAME: STEVEN FRANK RAMIREZ SR

HEARING:

Petition for Order confirming real property as asset of the
estate of Steven Frank Ramirez Sr

COUNSEL:

JENNEA ALLEN (PET)...HIGGS, FLETCHER & MACK LLP
STEVEN FRANK RAMIREZ SR (DEC)...

Currently under review by Legal Research

(LR)

Future Hearing: 3/21/18: Probate Status Report

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 02/28/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500849

CASE NAME: MICHAEL D. JUDD AKA MICHAEL DAVID JUDD ETC

SEE ALSO 4

HEARING:

Hearing Re: RECEIPT OF SETTLEMENT

COUNSEL:

SUZANNE BAILEY	(PET)...HARTNELL LAW GROUP
MICHAEL D. JUDD	(DEC)...
RANDI L KENNEDY	(PET/TP)...CHRISTOPHER A SHUMATE
BARBARA JUDD	(DEBRA L. LEFFLER STREETER)

GENERAL INFORMATION

Continued from 01/03/18. The only issue not settled in the agreement is the extraordinary fees which Judge Reilly tentatively reduced in June. Court orders Counsel to file any documents they want the Court to consider by 02/01/18.

THIS CASE IS SET FOR HEARING ON RECEIPT OF SETTLEMENT

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

1. Matter set on 10/25/17, wherein, Counsel reports matter settled. Parties and Court accept the settlement agreement placed on the record.
2. **Statement of Issue for Decision by Court filed 02/01/18** by Counsel Hartnell requesting Court to approve extraordinary fees in the reduced amount of \$2,860 due to 16.5 hours spent in responding to objections, appearances at mediation and engaged negotiation with the two objecting beneficiaries. **JTD**
3. **Need** signed settlement agreement.

RECOMMENDATION

Inquire status.

(lh)

Future Hearing: 10/24/18: Hearing Re: Final Discharge

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 02/28/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500849

CASE NAME: MICHAEL D. JUDD AKA MICHAEL DAVID JUDD ETC

SEE ALSO 3

HEARING:

Hearing Re: FIRST AND FINAL ACCOUNTING

COUNSEL:

SUZANNE BAILEY	(PET)...HARTNELL LAW GROUP
MICHAEL D. JUDD	(DEC)...
RANDI L KENNEDY	(PET/TP)...CHRISTOPHER A SHUMATE
BARBARA JUDD	(DEBRA L. LEFFLER STREETER)

GENERAL INFORMATION:

Continued from 06/19/17. Court approves statutory fees of counsel and petitioner. Court tentatively reduces request for extraordinary fees to \$1,542.50. Court approves request to withhold \$5,000 as a reserve to be accounted for in final distribution.

Continued from 01/03/18 at request of Court for Counsel to file supporting documentation regarding extraordinary fees by 02/01/18.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Executrix, Suzanne Bailey ["Petitioner"].

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

1. Accounting period 01/28/15 to 03/16/17.
2. Assets on Hand \$434,816.58 of which \$432,344.03 is in cash.
3. Statutory compensation of \$16,127.96 requested. Calculated.
4. Attorney requests extraordinary fees of \$4,560.00 for services rendered in connection with the sale of real property. Billed at \$425 for 9 hours' attorney time and \$75/hour for 9.8 hours' paralegal time. Itemized [LF, p. 41-44].
5. Petitioner was reimbursed for costs totaling \$23,044.57. Itemized [LF, pgs. 35-36]. Does Court wish to ratify reimbursement? JTD.
6. Post-death credit card payments were made. **Need** further clarification via verified supplement.
7. Check in the amount of \$800 made to "Sharilyn." **Need** further clarification via verified supplement.
8. Order Granting Ex Parte Petition for Preliminary Distributions totaling \$150,000 entered 10/04/16.

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

9. Petitioner requests authority to withhold the sum or \$5,000 as a reserve.
10. Petitioner requests discharge upon filing of receipts instead of entry of discharge order.
11. **Objections filed 06/07/17 by Barbara Judd.**
12. **Objections; Request for Surcharge; and Request for all Retirement Benefits to be paid to Objector, only, filed 06/12/17 by Randi L. Kennedy.**
13. Proposed Order 04/06/17 does not include findings re sole and separate property nor addresses reimbursement of costs to petitioner or preliminary distributions.

RECOMMENDATION:
Need to clear notes 6-7.
(nb/lh)

Future Hearing: 10/24/18: Hearing Re: Final Discharge

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 02/28/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600900

CASE NAME: PALMIRA N PASCUA

HEARING:

Hearing Re: PROOF OF BLOCKED ACCOUNT

COUNSEL:

NANCY A LOPEZ (PET)...PRO/PER
PALMIRA N PASCUA (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Proof of Blocked Account/Accounting review

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

1. Matter set on 01/25/18, wherein, Court ordered \$27,000 in cash to be placed in a blocked account prior to continued accounting review hearing date on 04/12/18, or Court will consider removing administrator and appointing Public Administrator.
2. **Need proof of blocked account.**

RECOMMENDATION

Inquire status.

(lc/lh)

Future Hearing: 4/12/18: Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 02/28/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600907

CASE NAME: MTR OF YOUNG S00K HAN

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

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

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON RECEIPT OF BOND

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

1. Court appointed Young See Ko as administrator with full authority on 01/24/18, with \$20,000 bond.
2. **Need** proof of bond.

RECOMMENDATION

Inquire status.

(lh)

Future Hearing: 4/03/18: Accounting Review re Young Sook Ko

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 02/28/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600908

CASE NAME: JORGE HIDALGO

HEARING:

FIRST AND FINAL Account and Report of DEBRA HIDALGO and Petition
for allowance of fees filed.

COUNSEL:

DEBRA HIDALGO (PET)...IGNAZIO FICARA
JORGE HIDALGO (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by
Debra Hidalgo, executor

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

1. Accounting period: 04/14/16 to 10/11/17
2. Assets on hand: \$57,853.49, cash, and vehicle valued at \$700.
3. Statutory fees of **\$5,669.58**, each, requested by petitioner and attorney.
Calculated. **JTD**
4. Petitioner identifies reimbursements made to Sandra Hidalgo for \$3,339.16 on
06/2/17 and Brenda Gautier for \$3,313.16 on 07/07/17, and Debra Hidalgo for
\$800 on 07/31/17 [Acct, 11/19/17, LFpg6]. **Need verified supplement with
itemization of costs.**
5. Petitioner hired her son, Che Butler, to repair real property to market it for sale.
Total repairs cost \$700 which was substantially less than the cost to hire a
contractor.
6. Notice was given.
7. ~Proposed order: 11/09/17

RECOMMENDATION:

Need to clear note #4, then Court's discretion. If approved, court to set hearing on filing of
receipts and final discharge for **03/06/19**.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 02/28/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601039

CASE NAME: MTR OF MARCELLA WASHINGTON TRUST

SEE ALSO 9 10

HEARING:

Hearing Re: PROBATE STATUS REPORT

COUNSEL:

BENNIE HILL (PET)...PRO/PER
THE MARCELLA WASHINGTON TRUST(TRU)...PRO/PER
JEANNIE PORTER (PET/TEE)...SUZANNE M GRAVES

GENERAL INFORMATION:

Continued from 12/12/17 at request of Court to clear probate notes.

THIS CASE IS SET FOR HEARING ON Status Report by Trustee, Jeannie M. Porter ["Petitioner"].

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

1. Petitioner alleges the estate is not in a condition to be closed as the accounting remains to be completed as counsel was out of town shortly after being retained. .
2. Petitioner requests an additional 2 months to close the estate.
3. Notice of Hearing and Proof of Service filed.

RECOMMENDATION:

Court's discretion.

(nb/lh)

Superior Court of Calif, County of San Bernardino

Page: 9

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

DATE: 02/28/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601039

CASE NAME: MTR OF MARCELLA WASHINGTON TRUST

SEE ALSO 8 10

HEARING:

Petition for TO COMPEL FOR PRELIMINARY DISTRIBUTE FUNDS FROM
LIVING TRUST

COUNSEL:

BENNIE HILL (PET)...PRO/PER
THE MARCELLA WASHINGTON TRUST(TRU)...PRO/PER
JEANNIE PORTER (PET/TEE)...SUZANNE M GRAVES

Waiver of Court Fees and Costs filed by BENNIE HILL is GRANTED

Currently under review by Legal Research.
(LR)

Notice:

Need Notice of Hearing with proof of service to daughters, Jeannie M. Porter & Tanya G. Washington; nieces, Tippiie Quillopo-Torres & Philena Quillopo; and son, Ronald K. Hill per Pr. C. § 17203.

(nb)

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

DATE: 02/28/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601039

CASE NAME: MTR OF MARCELLA WASHINGTON TRUST

SEE ALSO 8 9

HEARING:

First and Final Account and Report of JEANNIE PORTER and
Petition for allowance of fees

COUNSEL:

BENNIE HILL (PET)...PRO/PER
THE MARCELLA WASHINGTON TRUST(TRU)...PRO/PER
JEANNIE PORTER (PET/TEE)...SUZANNE M GRAVES

Waiver of Court Fees and Costs filed by BENNIE HILL is GRANTED
TOTAL FEES WAVIED TO DATE: \$465.00

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Report of Trustee and
Petition for Attorney's Fees, Reimbursement of Funds and Final Distribution, by Jeannie
M. Porter, Trustee

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

1. Accounting period: 04/28/16 to 09/30/17
2. Assets on hand: **\$100,583.80**, cash and remaining \$1,500 in vacant land.
 - a. Accounting does not balance and is off by **\$3,873.74**. Petitioner admits trust funds were commingled in several of petitioner's accounts making it difficult to identify all disbursements. Petitioner requests to repay Trust \$3,873.74 by deducting it from her share of final distribution [Acct, 11/09/17, LFpg4]. **JTD**
3. Attorney seeks compensation of **\$16,000**; however, attached invoices do not clearly sum up requested fees. [Acct, 11/09/17, LFpgs144-146]. **Need verified supplement with complete itemization of services.**
4. Petitioner seeks reasonable compensation of **\$4,084.68** calculated at 1% of trust assets annually. Itemized. [Acct, 11/09/17, LFpg147]. **JTD**
5. Petitioner alleges decedent owned a safe deposit box in Rosamond, California; however, the bank relocated to Palmdale/Lancaster prior to decedent's death and petitioner has been unable to trace the safe deposit box. **Court to inquire.**

6. Petitioner reimbursed herself **\$9,709.19** for administrative costs from proceeds of sale of real property. Petitioner has *some* receipts, statements and invoices to support a portion of costs totaling \$4,319.14 but does not appear to have proof of remaining \$5,390.05 in reimbursements. Trustee proposes to repay Trust **\$5,390.05** by deducting amount from her distributive share, and seeks Court approval of paid reimbursements and repayment. **Itemized. [Acct, 11/09/17, LFpg102-103]. JTD**
7. Petitioner made 'preliminary distributions' to beneficiaries: Jeannie Porter for \$29,540; Ronald K. Hill for \$7,200; Bennie M Hill for \$7,200; Tippiie Torres \$3,000; and Philena Quillopo \$3,000; Tanya G. Washington for \$1,606.28. Itemized.
8. Payments were also made to Evan Peoples (nephew of Trustee) for \$3,000 and Keya Causy (cousin of Trustee) for \$5,000; however, these appear to be expenses—not distributive share as they are not beneficiaries.
 - a. Distribution to Keya Causey (petitioner's daughter) was for partial reimbursement of funeral expenses. **Need** itemization of costs.
 - b. Distribution to Evan Peoples was for 180 hours of work he performed to repair Rosamond and Mojave and prepare for sale totaling \$3,000. **Need** itemization of costs and labor.
9. Proposed Distribution does not clearly identify distribution amounts due to each beneficiary. [Acct, 11/09/17, LFpg12]. **Need** verified supplement.
10. **Need** bank statement to support *final ending balance* per Local Rule 20-908. Note: petitioner attached bank statements exceeding 250 pages. **Need verified supplement with applicable statement(s) as of 09/30/17, only.** [Acct, 11/09/17, LFpgs154-424].
11. Petitioner requests reserve of \$25,000 for remaining Trust liabilities detailed in Schedule G. [Acct, 11/09/17, LFpg140]. **JTD**
12. ~Proposed Order: 12/12/17

RECOMMENDATION:

Need to clear notes, then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge to include informal account re reserves for **03/13/19**.

(lh)

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

DATE: 02/28/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700418

CASE NAME: MTR OF CAROLYN ELLIS

HEARING:

Hearing Re: FINAL ACCOUNTING (CHRISTINA RICKORDS)

COUNSEL:

CHRISTINA RICKORDS	(PET)...VOORHEES LAW GROUP
CAROLYN ELLIS	(DEC)...
JAMES HEPLER	(BEN)...
LILY GRANFIELD	(PET)...ROBINSON-LEGAL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Christina Rickords

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

1. Matter set on 11/01/17; wherein, Christina Rickords was removed as Trustee, and W.A. Hlavaty was appointed as successor trustee. Christina Rickords was ordered to turn over all trust documents, accounts, property, etc, to Mr. Hlavaty by 11/06/17. Ms Rickords to prepare a list of everything provided to Mr. Hlavaty and serve a copy of list on all counsel. The Court's previous Order that house be sold remains in its current form.
2. On 01/22/18, Court gave Ms. Rickords an extension to 02/05/18 to turn over documentation.
3. **Need** Accounting/List of property provided to successor trustee.

RECOMMENDATION

Inquire status.

(lh)

Future Hearing: 4/02/18: Hearing Re: OSC Re: Surcharge Against James Helper
Hearing Re: Status Report

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

DATE: 02/28/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701227

CASE NAME: Eunice Gloria Woods

HEARING:

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

COUNSEL:

DION R BICKHAM (PET)...ROSA MARQUEZ
EUNICE GLORIA WOODS (DEC)...

GENERAL INFORMATION

Continued from 01/18/18. Court requests supplement to be filed discussing the need for an attorney in fact for John Bickham.

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA Dion Bickham, nephew

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

1. Will waives bond. Net estate value is \$260,500 of which \$33,500 is personal property. Court for good cause could require bond per Pr.C. § 8481(b).
2. Petitioner is Power of Attorney for sole beneficiary of will; John Bickham, brother.
3. Jlana Bickham is mentioned in the will; however, is not listed in section 8.
 - a. **Need** verified supplement
 - b. **Need** Notice to Petition to Administer Estate and proof of service for Jlana.
4. ~Proposed Form Order: 12/07/17.

RECOMMENDATION

Need to clear note #3; Court's discretion re bond. If approved, set Accounting/Status Review for **05/08/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh)

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

DATE: 02/28/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800076

CASE NAME: GILBERTO PINELA RIVAS

HEARING:

Spousal Property Petition hearing.

COUNSEL:

LOURDES PINELA (PET)...PRO/PER
GILBERTO PINELA RIVAS (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Lourdes Pinela, spouse

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

1. Decedent died intestate testate 10/07/17 and is survived by a spouse and 5 children.
2. Petitioner requests confirmation of property belonging to the surviving spouse.
3. **Need** Attachment 7 explaining the facts upon which the petitioner bases the allegation that property should be confirmed.
4. **Need** notice of hearing and proof of service as to issue, Jerry I. Pinela and Maryjane A. Pinela.
5. ~Proposed form order: 01/25/18

RECOMMENDATION:

Need to clear notes #3-4, then Court's discretion.

(lh)

Superior Court of Calif, County of San Bernardino
Page: 13A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 02/28/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800090

CASE NAME: RONALD RICHARD SHELBY

HEARING:

Petition for letters of administration with will annexed with full IAEA

COUNSEL:

KIMBERLY SHELBY (PET)...PRISCILLA C SOLARIO
RONALD RICHARD SHELBY(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Probate of Wil and for Letters of Administration with Will Annexed, Full Authority under IAEA by Kimberly Shelby, daughter-in-law

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

1. Will waives bond; however, it is unclear whether petitioner is named executor. Estimated assets consist of personal property at \$375,000. The court may for good cause require that a bond be given, either before or after issuance of letters (Prob. Code, § 8481(b)).
2. The will conditionally incorporates decedent's Trust. **Need** Certification of Trust that meets the requirements in Pr. C. § 18100.5, to include a list of Trust beneficiaries for notice purposes. Does Court also wish to require a copy of decedent's Trust? **JTD**
3. Petitioner seeks letters of administration with will annexed; however, petition, item #3g indicates petitioner was named as executor. **Need** verified supplement.
4. **Need** Declination to Act by trustee of the Ronald R. Shelby Living Trust.
5. Notice of Petition to Administer Estate with proof of service filed 02/16/18; however, need to clear note #2 to determine notice.
6. **Need** Proof of Publication.
7. **Need** Receipt of will lodged with court.
8. ~Proposed form Order: 01/30/18

RECOMMENDATION:

Need to clear notes #2-7. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **05/08/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 14

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 02/28/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1400908

CASE NAME: RICHARD V. SMITH TRUST DATED 7/14/98

SEE ALSO 15

HEARING:

Hearing Re: PETITION FOR INSTRUCTIONS FOR TRUSTEE

COUNSEL:

CAROL STEINBRENNER	(PET)...WARD & WARD
RICHARD V. SMITH TRUST	(TRU)...
MELODIE SCOTT	(PET/STE)...J. DAVID HORSPOOL
AMERICAN CANCER SOCIETY	(PET)...LAW OFFICE OF TARA L COOPER
CITY OF HOPE	(RODRIGUEZ, HORII, CHOI & CAFFE)

Currently under review by Legal Research.
(LR)

Continued matter – notice not re-reviewed.

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

DATE: 02/28/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1400908

CASE NAME: RICHARD V. SMITH TRUST DATED 7/14/98

SEE ALSO 14

HEARING:

FIRST CURRENT Account and Report of MELODIE SCOTT and Petition
for allowance of fees filed.

COUNSEL:

CAROL STEINBRENNER	(PET)...WARD & WARD
RICHARD V. SMITH TRUST	(TRU)...
MELODIE SCOTT	(PET/STE)...J. DAVID HORSPOOL
AMERICAN CANCER SOCIETY	(PET)...LAW OFFICE OF TARA L COOPER
CITY OF HOPE	(RODRIGUEZ, HORII, CHOI & CAFFE)

GENERAL INFORMATION:

Continued from 11/29/17 at request of Counsel to clear probate notes.

THIS CASE IS SET FOR HEARING ON First Account Current and Report of Trustee and
Petition for its Settlement by Melodie Z. Scott

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

1. Accounting period: 12/11/14 to 12/31/16
2. Assets on hand: \$1,186,875.97, of which **\$6,875.97** is cash and remaining in real property.
3. Beginning cash assets includes a margin loan of (\$46,656.65). **Need** further clarification of asset via verified supplement. Does Court wish to require an Inventory and Appraisal? [See Acct 8/30/17, LFpg6]
4. **Need** verified supplement to include report per Pr. C. §16063(b), and provide clarification of the following Schedule C disbursements [See Acct, 08/30/17, LFpgs13-21]:
 - a. Need explanation of sale of assets e.g. gold bullion art, sterling flatware, art, antiques, and stock totaling.
 - b. Need description of payments to various insurance companies [LFpg13].
 - c. Trustee paid herself \$27,600 in trustee fees. Does Court wish for itemization and description of services?
 - d. Payments were made to various attorney firms throughout accounting period as follows: Barrister Professional Services \$4,018.75; Granowitz,

White & Weber \$4,570, Hartnell Law Group \$30,571.02; Horspool \$5,000; Paul Shimoff \$14,295.70; Steven R. Weber \$6,560. Court may wish to inquire. [LFpg18].

- e. Accounting fees paid to Dennis Phillips & Associates at \$3,000. Need itemization of services.
 - i. See also note 3(d) regarding additional accounting fees paid to Raumey Wilson. Court to inquire.
 - f. Payments to Raumey Wilson for property management \$2,181.78; miscellaneous property repairs \$613.56; accounting services \$3,622, and misc. trust expenses \$202.58. Need itemization of costs/services.
 - g. Multiple payments to Chris Scott and Ann Marie Scott for case management. Need description of costs/services and allegations regarding familial relationship to trustee. [LFpg20]
 - h. Partial reimbursement of \$10,000 paid to Carol Steinbrenner on 01/30/15 for costs advanced to trust. Need itemization of advanced costs. [LFpg21]
5. ~Proposed order: 08/30/17

RECOMMENDATION:

Need to clear notes #3-4. If approved, set future hearing for Accounting/Status Review on **05/02/18**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 16

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

DATE: 02/28/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700497

CASE NAME: THE RESTATED AMENDMENT TO DOLORES LIVING TRUST

HEARING:

Petition for ORDER CONFIRMING TRUST ASSESTS

COUNSEL:

THE RESTATED AMENDMENT TO THE DOLORES LIVING TRUST (TRU)...

VICTOR MIRANDA (STE)...STEPHEN A. WORKMAN

DAVID A MIRANDA

Waiver of Court Fees and Costs filed by DAVID A MIRANDA is GRANTED

Currently under review by legal research

(LR)

All parties have appeared in this matter.

Superior Court of Calif, County of San Bernardino

Page: 17

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 02/28/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1100151

CASE NAME: STEVEN BURNICE MOORE

SEE ALSO 18

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

LYLE STOTELMYRE

(CE/CPE)...M DANIEL SAYLOR

STEVEN BURNICE MOORE

(CTE/CEP)...

MICHELLE VANCE

(CP)...EDWARD B FISCHER & ASSOC

STEVEN MOORE

(PET)...BRYAN C. HARTNELL

BRYAN C HARTNELL

(PET)...BRYAN C HARTNELL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Receipt of Bond

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

1. Court approved 6th Account current on 01/24/18 with an increase in bond of \$20,000.
2. A \$20,000 surety bond was filed 02/14/18 as to Lyle Stotelmyre; however, not in LF at time of review. **JTD**

RECOMMENDATION

Inquire status.

(lh)

Future Hearing: 1/15/20: Accounting Review

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

DATE: 02/28/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1100151

CASE NAME: STEVEN BURNICE MOORE

SEE ALSO 17

HEARING:

Petition for Attorney's Fees

COUNSEL:

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

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Attorney Fees by Edward B. Fischel

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

1. Petitioner, Edward B. Fischel, is the attorney for Michelle Vance, conservator of the person of Steven Burnice Moore.
2. Petitioner requests fees for attorney and paralegal services totaling \$3,260 for 9.40 hours at \$375/\$325/\$135/\$95 accrued over a span of 3 years from 01/06/14 to 08/02/17. Itemized. [Petition, 01/25/18, LFpg7-8]. **JTD**
3. Petitioner requests reimbursement of \$465.00 for filing fee. **JTD**
4. Notice was given.
5. ~Proposed Order: 01/24/18

RECOMMENDATION

Court's discretion.

(lh)

Future Hearing: 1/15/20: Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 19

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

DATE: 02/28/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1200043

CASE NAME: MTR OF PAUL RICHARD BRISTOW JR

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

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

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON RECEIPT OF BOND

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

1. Matter set on 01/24/18, wherein, Court ordered a bond in the amount of \$33,000.
2. **Need proof of bond.**

RECOMMENDATION

Inquire status.

(lh)

Future Hearing: 4/04/18: 4th Account & Report

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

DATE: 02/28/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1200088

CASE NAME: LESLEY EGAN

HEARING:

FIRST Account and Report of CHRISTINA RIEKER and Petition for allowance of fees filed.

COUNSEL:

ROBERT STACKHOUSE	(CPE/TEE)...	JENNIFER M DANIEL
CHRISTINA RIEKER	(CPE/CP)...	JENNIFER M DANIEL
LESLEY EGAN	(CEP)...	
KARIN E HORSPOOL	(PET)...	KARIN E HORSPOOL
THE LESLEY EGAN SPECIAL NEEDS TRUST (TRU)...		

XREF: SBFSS081126

GENERAL INFORMATION

Continued from 09/20/17 at request of Court for Counsel to be present. Notice given by Judicial Assistant.

Continued from 11/22/17 at request of Court. Petitioner to give detailed information on spending.

THIS CASE SET FOR HEARING ON 1st SNT Account and Petition for Allowance of Fees by Successor Trustee Christina Rieker, sister.

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

1. Accounting period 02/04/16 – 04/30/17.
2. Assets on hand \$109,941.34 of which \$67,183.49 is cash.
3. Attorney seeks fees and costs totaling \$7,117.50 for 22.5 hours at \$275 per hour, reduced from \$325. Itemized [Acct. 07/18 LFpg25-30]. JTD
4. Petitioner seeks a reduction of bond from \$150,000 to \$120,000. However, with annual income it appears bond is sufficient. **No bond calculation provided.**
5. **Need verified supplement detailing spending per m/o on 11/22/17.**
6. Proposed order 09/07/17; however, bond calculation was not provided.

RECOMMENDATION

Need to clear note #5. If approved, set Accounting/Status Review for **08/15/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh)

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

DATE: 02/28/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700039

CASE NAME: MTR OF TOMASA DE CASAS

HEARING:

Petition for Court Appointed Attorney's Fees

COUNSEL:

MARIA DE CASAS	(CPE)...SHEASBY AND ASSOCIATES
TOMASA DE CASAS	(CEP)...EDWARD B FISCHEL & ASSOC
MIGUELITO DECASAS	(PET)...DUANE P BOOTH

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Attorney Fees by Edward B. Fischel

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

1. Petitioner, Edward B. Fischel, was appointed Counsel for Conservatee, Tomasa Decasas, in contested conservatorship and trust proceedings on 02/17/17.
2. Petitioner requests fees of \$11,810.50 for 29.90 hours at \$395/hour for attorney services. Itemized. [Petition, 01/24/18, LFpgs6-9]. **JTD**
3. Notice was given.
4. ~Proposed Order: 01/24/18

RECOMMENDATION

Court's discretion.

(lh)

Future Hearings: 5/02/18: Hearing Re: Accounting Review (Conservatorships)
Hearing Re: Accounting Review (Trust)
7/11/18: Conservatorship Compliance Review Hearing
1/17/19: Hearing Re: Accounting Review (Conservatorship)
Hearing Re: Accounting Review (Trust)

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

DATE: 02/28/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700189

CASE NAME: VIRGINIA QUEVEDO

SEE ALSO 23

HEARING:

Petition for Appointment Of Conservator Of The Person And Estate

COUNSEL:

MICHELLE T MAYFIELD	(PET)...CHRISTIAN U ANYIAM
AMAY GUILLEN	(PET/CPE)...LENITA A SKORETZ
FRANK GUILLEN	(CPE)...LENITA A SKORETZ
VIRGINIA QUEVEDO	(CEE)...J. DAVID HORSPOOL

GENERAL INFORMATION

Ex parte orders denied 05/30/17. Court makes interim orders that no one is to discuss facts in this case nor give documents to Virginia Quevedo. No visitation ordered until further notice. Attorney J. David Horspool appointed for Virginia Quevado.

Continued from 07/11/17. Counsel's report filed in Courtroom. Court appoints Michelle Mayfield as temporary conservator of the person and estate with \$347,000 bond. Court orders powers of attorney to make healthcare decisions and of the estate are suspended pending further order of the Court. Objections and competing petition will be filed by Amay Guillen. Court has no objection to conservatee being in a non-secured facility but orders that conservatee remain in her current placement pending further order of the Court. Court makes visitation orders. Court appointed E Joan Nelms as Guardian Ad Litem for Virginia Quevado. Notice given by Judicial Assistant.

Continued from 08/29/17. Hearing on temporary and general petition continued to be heard with competing petition. Per request of Counsel, hearing on 09/5/17 advanced and continued to 10/04/17.

Continued from 10/04/17. Dr. Sawicky's report filed in Courtroom. Court orders Michelle Mayfield to arrange an evaluation of Virginia Quevado by a geriatric psychiatrist as soon as possible. She is to notify Amay and Frank Guillen who will be making evaluation. Psychiatrist to be given a copy of Dr. Sawicky's report. Dr. Sawicky's report to be provided to Counsel. Parties may review report in Counsel's office but may not release any information provided in report. Matter continued for Counsel to review Dr. Sawicky's report.

No one is to discuss issues in this case with Virginia Quevado, or else it may negatively impact their positions in this matter. Court makes visitation orders.

Continued from 12/06/17. Court denied Dee Konczal's request to take Virginia Quevado to lunch. Counsel represent the appointing with geriatric psychiatrist is scheduled for 12/12/17 in San Bernardino with Dr. Kikani. As to *petition #1 – required bond \$382,000*. As to *petition #2 – required bond \$550,000*. Court admonishes all parties that Virginia Quevado is not to leave the facility in company of petitioners. Conservatee's friends may take her out of the facility as long as they are not joined by petitioners, or a petitioner from each side must attend as well. Conservatee's friends are not to discuss any litigation matters. Referred to Court Investigator for investigation and report. *Court orders a CI report regarding petition #2.*

THIS CASE SET FOR HEARING ON

- Petition #1 [filed 05/19/17] for Appointment of Conservator person and estate by Michelle T. Mayfield (friend/caregiver)
- Petition #2 [filed 08/28/17] for Appointment of Conservator of person and estate by Amay Guillen (granddaughter) and Frank Guillen (son)

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

Petition #1 by Michelle T. Mayfield (friend):

1. **Michelle T. Mayfield filed an amended petition on 02/16/18. It appears petitioner now seeks appointment as conservator of the person only. Need Notice to reflect amended petition to all relatives within the 2nd degree.**
2. Court will require bond of \$382,000.
3. Petitioner seeks medical powers. Capacity Declaration filed 07/14/17 is not dated at signature. **JTD**
4. Section 11 to petition [LF, p. 8] does not indicate relationships of named individuals to conservatee. **Need verified supplement.**
5. Petition is incomplete at item 9b and 9d re medical treatment. **Need verified supplement.**
6. **Need** return of Citation.
7. **Need** report of E. Joan Nelms, GAL.
8. Report of Counsel J. David Horspool filed 07/11/17.
9. CI Report filed 07/07/17. Supplemental CI report filed 09/19/17.
10. Proof of Completion of Conservatorship Training Class filed 07/17/17.
11. Court suspended Power of Attorney and Healthcare Directive as to agent Amay Rochell Guillen.
12. ~Proposed Form Order: 05/19/17

Petition #2 by Amay Guillen (granddaughter) and Frank Guillen (son):

13. Court will require bond of \$550,000.

14. Petitioners seek orders re powers under Pr. C. §2590 to: alter, improve, replace and rebuild property of the estate; requests court approval to clear, repair, and replace items in conservatee's home to preserve character and livability. JTD
15. Petitioners seeks medical powers. Capacity Declaration filed 09/15/17.
16. Petitioners seeks dementia powers. JTD
17. Supplemental Information filed 10/03/17.
18. Proof of Completion of Conservatorship Training Class filed.
19. CI Report filed 02/21/18.
20. **Need** return of Citation.
21. ~Proposed Form Order: 08/29/17

RECOMMENDATION

Need to clear notes 1, 3-6 and 19.

If approved, set hearing for Compliance Review for **10/03/18** for the filing of the required documents and hearing re Accounting Review for **05/08/19**. Any account to be filed 30 days in advance. Note requirements of Local Rules.

(lh/)

Superior Court of Calif, County of San Bernardino

Page: 23

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 02/28/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700189

CASE NAME: VIRGINIA QUEVEDO

SEE ALSO 22

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MICHELLE T MAYFIELD

(PET)...CHRISTIAN U ANYIAM

AMAY GUILLEN

(PET/CPE)...LENITA A SKORETZ

FRANK GUILLEN

(CPE)...LENITA A SKORETZ

VIRGINIA QUEVEDO

(CEE)...J. DAVID HORSPOOL

See notes on prior matter #22.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 24

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 02/28/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800017

VACATED

CASE NAME: MTR OF RONALD DAVE WEBER

HEARING:

Petition for Appointment of Conservator

COUNSEL:

BOBBIE JO WEBER

(CPE)...JENNIFER M DANIEL

RONALD DAVE WEBER

(CEP)...

Future hearing date: 04/26/18 Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 25

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 02/28/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800018

VACATED

CASE NAME: THERESA HERNANDEZ JIMENEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ALICE HERNANDEZ

(CPE)...KARIN E HORSPPOOL

ROSEANN ULLOA

(CPE)...KARIN E HORSPPOOL

THERESA HERNANDEZ JIMENEZ

(CEP)...MITCHELL I ROTH

Future hearing date: 03/08/18 Petition for Conservator

Superior Court of Calif, County of San Bernardino

Page: 26 add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

ELDER ABUSE

DATE: 02/28/18 TIME: 9:30 DEPT: S37P

CASE#: EAP PS1800018

CASE NAME: STIRDIVANT VS McCARTHY

HEARING:

Hearing Re: Elder Abuse Restraining Order

COUNSEL:

DAVID STIRDIVANT (PP)...PRO/PER
LESLIE MCCARTHY (RP)...

GENERAL INFORMATION

Ex parte Orders granted 02/14/18. Sheriff will serve this order without charge as the order is based on unlawful violence. Clerk shall enter this Order into CA Restraining and Protective Order System.

THIS CASE IS SET FOR HEARING ON Elder Abuse Restraining Order

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

1. Petitioner, David Stirdivant, and Don Stirdivant seek protection from Leslie McCarthy.
2. Notice of hearing and proof of service as to Leslie McCarthy (respondent) filed 02/15/18.
3. No response filed as of review.
4. ~Proposed Order: 02/14/18

RECOMMENDATION

Court's discretion.

(lh)

Superior Court of Calif, County of San Bernardino
Page: 27 add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 02/28/18 TIME: 9:30 DEPT: S37P

CASE#: EAP PS1800019

CASE NAME: PLITT VS PLITT

HEARING:
Hearing Re: Elder Abuse Restraining Order

COUNSEL:
JUDITH M PLITT (PP)...PRO/PER
JOSHUA CHRISTIAN PLITT (RP)...

GENERAL INFORMATION

Ex parte orders granted 02/14/18. Sheriff will serve this order without charge as the order is based on unlawful violence. Clerk shall enter this Order into CA Restraining and Protective Order System.

THIS CASE IS SET FOR HEARING ON Elder Abuse Restraining Order

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

1. Petitioner Judith Plitt seeks protection from Joshua Christian Plitt (son/respondent)
2. Notice of Hearing and Proof of Service as to Joshua Christian Plitt filed 02/20/18.
3. No response filed as of date of review.
4. ~Proposed Order: 02/14/18

RECOMMENDATION

Court's discretion.

(lh)