



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 03/05/18

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.

(02/06/18 & 02/28/18 ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PROBATE**

DATE: 03/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO DS1000147

CASE NAME: LYNN K ANDERSON SPECIAL NEEDS TRUST

SEE ALSO 2

HEARING:

Hearing Re: OSC RE TERMINATION OF SNT/STATUS OF C'TORSHIP PTN

COUNSEL:

PHYLLIS ANDERSON (PET/TEE)...DAVID S HAMILTON

THE LYNN K ANDERSON SPECIAL NEEDS TRUST (TRU)...

XREF: CONPS1700129 MTR OF LYNN KIELE ANDERSON

GENERAL INFORMATION

Continued from **03/13/17** on courts motion.

Continued from **08/14/17**. Court clears note 1 & 2. Court needs to further reference to dissolving special needs trust of conservatorship petition at this time. Court notes there is a related conservatorship case CONPS1700129.

Continued from 11/13/17. Matter trailed to date of accounting of 03/05/18.

THIS CASE IS SET FOR HEARING ON OSC re Termination of SNT/Status of Conservatorship Petition

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

1. OSC set at 11/28/16 hearing, wherein, an oral motion was made to dissolve the SNT.
2. Notice of Continuance filed 08/21/17; however, **need** notice to bonding company- Suretec Insurance Company.
3. **Notice of non-payment of bond premium by American Contractors Indemnity Company filed 02/22/18.**

RECOMMENDATION:

Need to clear note 2 and Court's discretion re OSC.

(nb/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO DS1000147

CASE NAME: LYNN K ANDERSON SPECIAL NEEDS TRUST

SEE ALSO 1

HEARING:

Fifth & Final Account and Report of PHYLLIS ANDERSON and
Petition for allowance of fees filed.

COUNSEL:

PHYLLIS ANDERSON (PET/TEE)...DAVID S HAMILTON
THE LYNN K ANDERSON SPECIAL NEEDS TRUST (TRU)...

XREF: CONPS1700129 MTR OF LYNN KIELE ANDERSON

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 5th and final account of SNT, Petition for Attorney's fees; Petition to Distribute Remaining Assets to Successor Trustee by Phyllis Anderson, Former Trustee.

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

1. Accounting period:08/01/14-05/31/17
2. Assets on hand: \$21,303.41 of which\$1,103.10 is cash in non-cash assets.
3. Current bond amount: \$65,000.00.
 - a. The bond calculation on page 3 is incorrect as the personal property on hand is \$21,303.41 and not \$271.01. Does Court wish to require a verified supplement with corrected bond calculation? **JTD**
 - b. A request to reduce bond was not made; however, bond appears to be excessive as the carry value of total personal property on hand is \$21,303.41. Suggest lowering bond amount to \$30,743.00 which includes recovery. **JTD**
4. Lorraine Dotson was appointed interim successor trustee on 06/01/17.
5. Petitioner waives fees at this time.
6. Attorney is requesting fees of \$5,575.81 for 33.08 (only charging for 31.78 hours as 1.3 hours were at "no charge") hours at \$400/300/225 for 9.28 hours' attorney time and \$125 for 22.5 hours' paralegal time. Itemized. [LF pgs. 22-27] **JTD**.
7. It appears that were various payments for a truck from 08/01/14-09/01/15 and then the 2007 Ford Edge payments replaced it; however, there is no mention in the

report if it was sold or donated. Court to inquire if the truck was sold or donated as it is not listed as part of the property on hand or in alternative, need verified supplement. [LF pg. 20] **JTD**

8. All remaining funds after payment of attorney's fees are to be distributed to interim successor trustee, Lorraine Dotson.
9. Notice given.
10. **Notice of non-payment of bond premium by American Contractors Indemnity Company filed 02/22/18.**
11. Proposed order: 11/13/17 title of order doesn't match petition; accounting end date is incorrect in #1 & 2; distribution of remaining assets is not indicated.

RECOMMENDATION

Court's discretion. If approved, set Final Discharge hearing for **03/11/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1100143

CASE NAME: MTR OF PAUL ROSS

HEARING:

Accounting Review

COUNSEL:

INLAND COUNTIES REG CNTR (PET/TEE)...STEVEN K BECKETT

PAUL ROSS (TRU)...

SPECIAL NEEDS TRUST OF PAUL ROSS (TRU)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review

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

1. Fifth Account of Trust approved on 05/09/16.
2. Need Sixth Account beginning with 01/01/16.

RECOMMENDATION

Inquire status

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400371

CASE NAME: Carl Lee Peavy

HEARING: FIRST AND FINAL Account and Report of STACEE BLOKZYL and
Petition for allowance of fees filed.

COUNSEL:

STACEE BLOKZYL (PET)...MICHAEL C MADDUX
CARL LEE PEAVY (DEC)...
STATE OF CA FRANCHISE TAX BOARD (TP)...PRO/PER

GENERAL INFORMATION:

Continued from **06/19/17** at request of administrator. Accounting to be filed by 09/18/17.
Continued from 10/16/17 and 01/22/18 to clear probate notes.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for fees by
Administrator, Stacee Blokzyl ["Petitioner"].

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

1. Final Inventory and Appraisal filed 11/02/17 has the following issues:
 - a. Section 6 re bond is incomplete;
 - b. Name of person who signed Inventory and Appraisal is blank.
2. Petitioner has used a local, incomplete Riverside County form. Need proper, amended account that complies with Pr. C. § 1060 et seq.
2. Accounting period 01/21/14 to 07/18/16.
3. Need Summary of Account and supporting schedules. It cannot be determined whether or not this accounting balances.
4. Petition indicates assets on hand consist of real property. However, real property was sold and inventory and appraisal filed 09/12/16 includes cash assets.
5. Petitioner waives compensation.
6. Need proof of service to Notice of Proposed Action re Sale of Real Property.
7. Need further clarification regarding Pr. C. §13100 petition [LF, p36] as to Wells Fargo Account that is not included on final inventory and account via verified supplement.
8. Need statement regarding notice to Franchise Tax Board or notice per Pr. C. §9202(c)(1).
9. Need notice to Franchise Tax Board who requested special notice.

RECOMMENDATION:

Need amended accounting to be set on first check calendar no sooner than **05/07/18**. This accounting does not appear to be a true and complete accounting of the trust and should be deemed in the nature of a status report. There is insufficient information and known defects that should preclude the Court from approving this accounting period.

(nb/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500153

CASE NAME: RAYMOND H. NICKERSON JR. AKA RAY NICKERSON

HEARING:

Hearing re Final Discharge

COUNSEL:

SUZANNE A. SWAIN	(OBJ)...CALDWELL, KENNEDY & PORTER
RAYMOND H. NICKERSON JR.	(DEC)...
BARBARA A SHULTS	(PET)...JIMMY PHILIP METTIAS
DANNY E SHULTS	

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Barbara Shults, friend, approved on 02/27/17.
2. Receipts filed.
3. **Need** receipts from Danny Shults and Suzanne Swain.
4. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.

(ww)

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

DATE: 03/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500573

CASE NAME: RUTH EVELYN CARDENAS

SEE ALSO 7

HEARING:

Motion Re: VACATE VOID ORDERS Filed by Respondent BONNIE
CARDENAS

COUNSEL:

LEANA WEATHERSBY	(PET)...LAWRANCE A WIDDIS
RUTH EVELYN CARDENAS	(DEC)...
BONNIE CARDENAS	(PET/APP/OBJ)...JEFF GROTKE
DEPT OF HEALTH CARE SRVCS	(PRO/PER)

Currently under review by Legal Research

LR

(ww)

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

DATE: 03/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500573

CASE NAME: RUTH EVELYN CARDENAS

SEE ALSO 7

HEARING:

Accounting Review

COUNSEL:

LEANA WEATHERSBY	(PET)...LAWRANCE A WIDDIS
RUTH EVELYN CARDENAS	(DEC)...
BONNIE CARDENAS	(PET/APP/OBJ)...JEFF GROTKE
DEPT OF HEALTH CARE SRVCS	(PRO/PER)

GENERAL INFORMATION

Continued from **11/09/17**. No contact by Counsel Widdis or his office [notice of inability to appear filed 11/02/17]. Stay extended to 11/30/17.

Continued from 11/30/17. Court orders stay remains in place to next hearing date of March 5, 2018.

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 Leana Weathersby, daughter, on 11/14/16; full authority, \$330,000 bond.
2. Partial and Reappraisal for Sale Inventory and Appraisal filed. **Need** final Inventory and Appraisal.
3. **Need** accounting or status report.
4. Settlement conference statement filed 10/16/17 re Court of Appeal Case No. E069013.

RECOMMENDATION

Need to clear notes 2-3.

(lc/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500671

CASE NAME: JOULAN LU

HEARING: FINAL Account and Report of WENSHENG XU and Petition for allowance of fees

COUNSEL:

WENSHENG XU (PET)...FEI PANG
JOULAN LU (DEC)...
STATE OF CA FRANCHISE TAX BOARD (TP)...PRO/PER

GENERAL INFORMATION:

Continued from **06/26/17** for review of supplement filed 06/22/17. Counsel indicates an amended final accounting may be filed. Court notes amended final accounting to be filed by 07/28/17.

Continued from **08/28/17** at request of court. Nothing new filed in this matter.

Continued from **10/16/17** at request of counsel.

Continued from 12/04/17 at request of counsel to file further supplement.

THIS CASE IS SET FOR HEARING ON Final Accounting and Report of Personal Representative, Wenshen Xu ["Petitioner"].

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

1. Account period 01/01/16 – 10/06/17
2. Summary of account indicates assets on hand \$397,500.00 consisting of real property.
3. No compensation is requested.
4. Summary of Account filed 10/12/17, page 2, [Supp, LF, p.3], indicates receipts in the amount of \$801.87 for filing fees and is conflicting with Exhibit A attached, [LF, p. 6]. **Supplement filed 12/01/17 indicates need further time to clarify discrepancy.**
5. **Need** findings re: known creditor; there is a creditor's claim from American Medical Response filed on 11/02/15. However, there is no allowances or rejection notices in the file regarding these claims. Supp. filed 10/12/17 and 12/01/17 indicate petitioner is still awaiting on a satisfaction and release from American Medical Response which is also known as Credence Resource Management.

6. Creditor's Claim filed by Franchise Tax Board in the amount of \$2,519.22. **Need** allowance or rejection notice.
7. Unconformed Notice of Hearing, affixed to supplement filed 10/12/17, does not include parent(s) of minors or creditor, American Medical Response and does not give 15 days' notice. **Need** proper service.
8. **Need** notice to Franchise Tax Board as they requested special notice.
9. Decedent died intestate with 2 minor children (12 & 6) who would also share a two-thirds distribution in the estate per Pr.C. §6401 if the real and personal property is separate property of decedent. Does Court wish to appoint counsel for minors?
JTD.

RECOMMENDATION:

Need clear notes 4 - 8. If approved, set hearing on the filing of receipts and final discharge for **03/11/19**

(nb/cs)

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

DATE: 03/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500732

CASE NAME: JOE ANGEL ACOSTA

HEARING: re Final Discharge

COUNSEL:

FRANK ACOSTA	(PET)...GAUDY LAW, INC
JOE ANGEL ACOSTA	(DEC)...
KATHLEEN SPRING VENEGAS	(PET)...LAMB MORRIS & LOBELLO
SPRING VENEGAS	(PET)...LAMB MORRIS & LOBELLO

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Petition for Final Distribution approved on 02/27/17.
2. **Need** receipts.
3. Petitioner requested the amount of \$15,000 in reserves. **Need** informal accounting of expenditures or distribution from the reserves, together with receipt for expenditure or distribution per Local Rule 20-911
4. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION:

Need to clear notes.

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600543

CASE NAME: MTR OF DAVID C HOFF

SEE ALSO 11

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$500.00 ON ADMIN & ATTORNEY

COUNSEL:

DOUGLAS P HOFF (PET)...KULKARNI
DAVID C HOFF (DEC)...

GENERAL INFORMATION

Continued from 01/22/18. Court trails matter to March 5, 2018. Counsel indicates that Laura Stodden Parker passed away.

THIS CASE SET FOR HEARING ON OSC RE Sanctions of \$500.00 on Administrator and Attorney

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

1. Matter set on 12/18/17 wherein Administrator and Attorney failed to appear. OSC re sanctions of \$500.00 for failure to file set.
2. Court to see Declaration of Attorney Ernest Baumberger re: Order to Show Cause filed 01/12/18.
 - a. In above mentioned declaration, counsel indicates that prior attorney Laura Stodden Parker passed away.
 - b. Counsel also indicates that they were unaware of the hearing on 12/18/17 as the matter was not properly calendared by the law office support staff.
3. Substitution of Attorney filed 01/11/18 in which Douglas is now represented by Deepa Kulkarni.

RECOMMENDATION

Court's discretion.

(cs/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600543

CASE NAME: MTR OF DAVID C HOFF

SEE ALSO 10

HEARING:

Accounting Review

COUNSEL:

DOUGLAS P HOFF (PET)...KULKARNI
DAVID C HOFF (DEC)...

GENERAL INFORMATION

Continued from **12/18/17** no appearance. Counsel and Douglas Hoff to be personally present in court on 01/22/18 for OSC re sanctions of \$500.00 for failure to file accounting.

Continued from 01/22/18.

THIS CASE SET FOR HEARING ON OSC Re Accounting review/Status.

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

1. Letters of Testamentary issued to Douglas Hoff, brother, on 10/17/16, full authority, no bond.
2. Final Inventory and Appraisal filed 01/22/18.
3. **Need** accounting or status report.

RECOMMENDATION

Inquire status of accounting.

(ww/cs/ww)

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

DATE: 03/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700300

CASE NAME: Richard Lewis Shuttleworth

HEARING:

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

COUNSEL:

MICHAEL CANONICA (PET)...THOMAS W DOMINICK
RICHARD LEWIS SHUTTLEWORTH (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Report of Executor on Waiver of Account; Waiver of Statutory Executor Commissions; Petition for Order Fixing and Allowing Statutory and Extraordinary Attorneys' Fees and Petition for Final Distribution by Michael Canonica, nephew/executor

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

- 1 Assets on hand: \$241,289.25 in cash.
- 2 Petitioner waives statutory commissions.
- 3 Attorney requests statutory fees of \$10,452.71. Calculated.
- 4 Attorney request extraordinary fees of \$1,705.00 billed at \$350/hr for 4.40 hours of attorney time and \$110/hour for 1.50 hours of paralegal time. Itemized. (Pet. LF pgs. 16-20]
- 5 Statement indicating that cash has been invested and maintained in an interest bearing account per Pr.C.§ 1064(a)(5) is missing; however, bank statement provided indicates that account is an "interest checking". [LF pg. 22] **JTD**
- 6 ~Proposed Order: 11/13/17

RECOMMENDATION:

Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge for **03/11/19**.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1701000

CASE NAME: TAMMY MADISON

HEARING:

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

COUNSEL:

GREGG A MADISON
TAMMY MADISON

(PET)...THE EDGAR LAW FIRM
(DEC)...

GENERAL INFORMATION

Continued from 01/22/18.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Gregg Madison, spouse

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

1. All heirs waive bond. The estate consists of \$180,000.00 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. The petition for probate is on an outdated form. **JTD**
3. ~Proposed Form Order: 10/04/17

RECOMMENDATION

Court's discretion re bond and note 2. If approved, set Accounting/Status Review **04/01/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800102

CASE NAME: MTR OF ROWENA FAY SMITH

HEARING:

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

COUNSEL:

TRINA ALEXANDER (PET)...MITCHELL I ROTH
ROWENA FAY SMITH (DEC)...

GENERAL INFORMATION

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

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

1. Bond of \$310,000.00 requested. Ok. The estate consists of \$310,000.00 of which \$180,000.00 is personal property.
2. **Need** Notice to Rhonda Seymour per Request for Special Notice filed 02/08/18.
3. ~Proposed Form Order: 02/01/18

RECOMMENDATION

Need to clear note 2. \$310,000.00 bond. If approved, set Accounting/Status Review **05/13/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800103

CASE NAME: MTR OF RICHARD A SCOLLON

HEARING:

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

COUNSEL:

RANDY DIEHL (PET)...LAW OFFICE OF MARY M. BADER
RICHARD A SCOLLON (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Randy Diehl, executor/trustee

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

1. Will waives bond. The estate consists of \$567,000.00 of which \$79,000.00 is personal property. Petitioner is a non-resident and the court may require bond if the proposed personal representative resides outside California per Pr. C. § 8571. Court also has discretion to require bond per Pr.C. § 8481(b).
2. The will conditionally incorporates decedent's Trust. Copy of trust filed 02/01/18.
3. **Need** Notice to Petition to Administer Estate and proof of service.
4. **Need** proof of publication.
5. ~Proposed Form Order: 02/01/18

RECOMMENDATION

Need to clear notes 3 & 4. Court's discretion re bond. If approved, set Accounting/Status Review for **05/13/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

DATE: 03/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800111

CASE NAME: TERESITA SANTOS DANTINNE

HEARING:

Petition for LETTERS OF ADMINISTRATION W/ FULL IAEA

COUNSEL:

BASIL DANTINNE (PET)...LAW OFFICE OF DAVID PHILPSON
TERESITA SANTOS DANTINNE (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Basil Dantinne, spouse

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

1. Petitioner is sole heir and waives bond. Petitioner indicates that there is no real or personal property and that the petition is for "litigation purposes only". The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
 - a. Court may wish to inquire if there is a related case that is being litigated. **JTD**
2. **Need** proof of publication
3. ~Proposed Form Order: 01/29/18

RECOMMENDATION

Need to clear note 2. Court's discretion re bond. If approved, set Accounting/Status Review **05/13/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

DATE: 03/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800112

CASE NAME: MTR OF JOHN J LUCARIELLO

HEARING:

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

COUNSEL:

JOHN LUCARIELLO (PET)...PRO/PER
JOHN J LUCARIELLO (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters of Administration with Will Annexed with Full Authority under IAEA by John David Lucariello, son

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

1. Will waives bond. The estate consists of \$400,000.00 in real property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. This petition appears to be an ancillary estate as petitioner indicates that the original will was filled in Snohomish County Superior Court in Washington.
3. **Need** Declination to act by Michael John Lucariello, named successor executor.
4. **Need** Notice to Petition to Administer Estate and proof of service.
5. **Need** proof of publication.
6. No Form Order Provided.

RECOMMENDATION

Need to clear notes 3-5. Court's discretion re bond. If approved, set Accounting/Status Review for **05/13/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1701171

CASE NAME: THE LUCY WEBB TRUST DATED 12/18/95

HEARING:

Petition for INSTRUCTIONS AND CONFIRMATION OF ASSETS

COUNSEL:

REBECCA L WEBB (PET)...ROBERT A COHEN
THE LUCY WEBB TRUST (DEC)...

Currently under review by Legal Research

LR

NOTICE:

Notice given.

(ww)

Superior Court of Calif, County of San Bernardino
Page: 18A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 03/05/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1600093

CASE NAME: JOE MANUEL SAUCEDO

HEARING:

Motion Re: NOTICE OF MOTION AND MOTION TO ENFORCE ORDER AND FOR
SANCTIONS IN THE AMOUNT ETC Filed by Petitioner RUTHE A HARRIS

COUNSEL:

ALICIA LOPEZ SAUCEDO	(MARGARET HELEN ARTER
JOE MANUEL SAUCEDO	(DEC)...
MICHAEL F DIAZ	(PET)...AVILES & ASSOCIATES
RUTHE A HARRIS	(ARMENTA LAW
RUTHE A HARRIS	(TP)...MICHAEL J. ARMENTA

Request for Waiver of Court Fees and Costs filed by ALICIA LOPEZ SAUCEDO is GRANTED

Currently under review by Legal Research.
(LR)

(CS)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIPS

DATE: 03/05/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1400100

CASE NAME: ANTONIO M CABRERA

VACATED

HEARING:

Accounting Review

COUNSEL:

JAIME R CABRERA

(CPE)...LAYNE A BARTHOLOMEW

RICHARD CABRERA

(CPE)...LAYNE A BARTHOLOMEW

ANTONIO M CABRERA

(CEP)...JENNIFER M DANIEL

MATTHEW SHEASBY

(PET)...

JOSE EDUARDO CABRERA

(PET/OBJ)...KAREN E. ZUBIATE

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Second Account for Jose Eduardo Cabrera, Successor Trustee approved on 12/05/16.
2. Need Third Account beginning with 01/01/16.

RECOMMENDATION

Inquire status

(cs)

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

DATE: 03/05/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700063

CASE NAME: MTR OF BERTHA MAE TURNER

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of L'TANYA ANDERSON

COUNSEL:

L'TANYA ANDERSON (CPE)...PRO/PER
BERTHA MAE TURNER (CEP)...ROSE C ROSADO

GENERAL INFORMATION

Continued from 11/13/17 and 01/22/18.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. L'Tanya Anderson, niece, appointed conservator of the person and estate on 05/08/17, no bond.
2. Final Inventory & Appraisal per Pr.C.§2610 filed 11/09/17.
3. Proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610 filed 11/13/17.
4. The conservatorship estate holds interest in real property located in Detroit Michigan, **need** proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313.
5. Notification of Conservatee's rights per Pr.C.§1830(c) filed 11/09/17.
6. Determination of Conservatee's Appropriate Level of Care form GC-355 filed 11/15/17.
7. Care Plan filed 05/30/17.

RECOMMENDATION

Need to clear note 4 then Court's discretion.

(ww)

Future Hearing: 6/18/18: Accounting Review

Superior Court of Calif, County of San Bernardino
Page: 20A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 03/05/18 TIME: 9:30 DEPT: S35P

CASE#: RC RS00441

CASE NAME: ADAM TAN NGUYEN

HEARING:

Hearing Re: STATUS OF POOL ON THE PROPERTY

COUNSEL:

VICKIE NGUYEN (PET)...
ADAM TAN NGUYEN (PCE)...MAUREEN MURATORE

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status of Pool on the Property

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

1. Hearing was set by Court on 02/08/18 to address the pool that is not fenced.

RECOMMENDATION

Court's discretion.

(ww)

Superior Court of Calif, County of San Bernardino
Page: 20B add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 03/05/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1300230

CASE NAME: Keith Drew

HEARING:

Hearing Re: TO ADDRESS CONSERVATORSHIP REPORT FILED 1/25/18

COUNSEL:

TAMANNE ARMINGTON (CPE)...PRO/PER
KETIH DREW (CEP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON To Address Conservatorship Report filed 01/25/18.

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

1. Hearing set by Court on 02/08/18 to address conservatorship report filed 01/25/18.
2. Report indicates gun is in nightstand of the conservatee.

RECOMMENDATION

Court's discretion.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PUBLIC GUARDIAN**

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON DS1000254

CASE NAME: ALICE MAY SIMONS-RUBIO

HEARING:

THIRD Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
ALICE MAY SIMONS-RUBIO (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 3rd account current and petition for fees

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

1. Accounting period covers 12/02/14-12/31/16.
 - a. **Need** Amended Order settling 2nd Account for the following reasons:
 - i. Accounting period was incorrectly stated as 11/10/11-12/~~31~~/14 in the report but is actually 11/10/11-12/**01**/14 according to the schedules.
 - ii. Ending cash assets in #6 do not match #13a in summary of account.
 - iii. Total Property on Hand amount is incorrect on page 2 of the order as real property was sold and is no longer an asset of the estate.
2. Assets on hand \$2,996.54 consisting of \$158.51 in cash and the remainder in irrevocable burial trusts.
3. Public Guardian requests fees totaling \$5,000.00. Approving and confirming \$4,200.00 will be deferred until such time as the conservatorship estate has sufficient funds for such purpose; approving and confirming \$800.00 which was previously collected by petitioner. Generally itemized.
4. County Counsel request fees in the amount of \$2,500.00. Approving and confirming and \$2,100.00 will be deferred until such time as the conservatorship estate has sufficient funds for such purpose; approving and confirming \$400.00 was previously collected by petitioner. Generally itemized.
5. The conservatee currently owes \$450.00 in Court Investigator's fees; however, there are insufficient funds to pay the fees.
6. Notice given.
7. **Notice of the conservatee's death on 06/10/17 filed on 06/22/17.**

8. ~Proposed Order: 08/29/17

RECOMMENDATION:

Need to clear note 1a then Court's discretion. If approved, set hearing for the final accounting for **04/30/18** as accounting is overdue.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS0700101

CASE NAME: ESTHER LEE JONES

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
ESTHER L JONES (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 03/25/18.

Continued from 07/10/17 at request of counsel to file accounting.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Seventh Account entered 07/15/16; account or waiver of account now due.

RECOMMENDATION:
Inquire status.
(nb/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS0700184

CASE NAME: REED M. CHODAN

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
REED MARK CHODAN (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 08/11/18.

Continued from 07/31/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present 6th account by PG approved on 09/16/15.
2. **Need** 7th account or waiver of account beginning with date of 05/01/16.

RECOMMENDATION:

Inquire status of accounting.

(nb/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS0800129

CASE NAME: ERIK OLINGER

HEARING: Second and Final Account and Report of PUBLIC GUARDIAN and
Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
MELODIE Z SCOTT	(SC)...HORSPOOL & HORSPOOL
ERIK OLINGER	(CEP)...HARTNELL LAW GROUP
ELISABETH KEMPE OLINGER	

GENERAL INFORMATION

Conservatorship terminated 11/06/14. Conservatee passed away on 10/24/17.

THIS CASE IS SET FOR HEARING ON Second and Final Account and Petition for Fees
by Public Guardian

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

1. Accounting period covers 4/29/14 – 08/11/16
2. Assets on hand \$0.00
3. Public Guardian request fees of \$1,691.00 pursuant to a new Court-approved fee schedule effective 07/01/14. For the period of 04/29/14 – 06/30/14 approving the fee of \$291.00 and for the period of 07/01/14 – 01/31/15 approving and confirming the sum of \$1,400. Generally itemized. JTD
4. County Counsel request fees of \$891.00 pursuant to a new Court-approved fee schedule effective 07/01/14.. For the period of 04/29/14 – 06/30/14 approving the fee of \$291.00 and for the period of 07/01/14 – 12/31/15 approving and confirming the sum of \$600. Generally itemized. JTD
5. ~Proposed order: 12/12/17

RECOMMENDATION:

Need to clear note 5, then Court's discretion. If approved, set next hearing for receipts and final discharge for **03/11/19**

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1200051

CASE NAME: JULIA LEFAVE

VACATED

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

JULIA LEFAVE

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

VACATE - This appears to a duplicate accounting review as there is one already set on 02/26/17 for Public Guardian.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1200255

VACATED

CASE NAME: BARRY L ADAMS

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

BARRY L ADAMS

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

(ww)

Future hearing dates: Accounting Review 06/01/18

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300222

CASE NAME: MTR OF PATRICIA BATTLE

HEARING:
Accounting Review

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
PATRICIA BATTLE	(CEP/CEE)...HARTNELL LAW GROUP
LUTHER A WAGONER JR	(CPE)...PRO/PER

GENERAL INFORMATION

Successor Conservator, Luther Wagoner, appointed 11/18/16.

Continued from 12/19/16 and 05/22/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Second Account entered 02/18/16.
2. Need Third and Final account starting with 11/01/15.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(nb/lh/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300231

CASE NAME: Martha Sanchez

HEARING:
Accounting Review

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
MARTHA SANCHEZ	(CEP)...HARTNELL LAW GROUP
DONNASUE SMITH ORTIZ	(PET)...

XREF: PROPS1300325 RAUL SANCHEZ

GENERAL INFORMATION

Continued from 07/31/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 1st Account by PG approved on 08/03/15.
2. **Need** 2nd account beginning with date of 02/01/15.

RECOMMENDATION:

Inquire status of accounting.

(nb/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300350

CASE NAME: Evelyn Graves

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
EVELYN GRAVES (CEP)...HARTNELL LAW GROUP

2nd Waiver of Account sent to department for signature on 02/15/18. Clerk's office to set next Accounting review for **04/01/19**.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400055

CASE NAME: Jordan Brooks

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
JORDAN BROOKS (CEP/CEE)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters terminated on 04/18/16.

Continued from **09/12/16** and **12/19/16** at request of counsel. No further continuances will be granted.

Continued from 06/05/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. On 5/9/16 Court approved the 1st Account Current for the period ending 2/26/15.
2. On 9/2/16 PG withdrew the Petition to re-establish LPS conservatorship and Court set hearing re final accounting.
3. **Need 2nd** and final account beginning 02/27/15.

RECOMMENDATION:

Inquire status of accounting.

(sa/nb/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400062

CASE NAME: RAYMOND PERAZA

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
RAYMOND PERAZA (CEP/CEE)...HARTNELL LAW GROUP

GENERAL INFORMATION:

Letters expire 04/07/18

Continued form 04/10/17 and 12/11/17 at request of counsel

THIS CASE SET FOR HEARING ON Accounting Review

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

1. Order Settling First Account entered 09/26/16; second account or waiver of account now due beginning with 06/01/15.
2. Ex parte petition to Dispense with accounting returned due to missing historical addresses and need proof of service.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. §2620.2

(nb/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400282

CASE NAME: RONALD R SESATE

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
RONALD R SESATE (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION
Letters expired: 11/14/17

THIS CASE IS SET FOR HEARING ON accounting review

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

1. 1st account of PG approved on 10/16/17.
2. On 07/14/17 Court ordered the conservatorship terminated and a final accounting filed.
3. **Need 2nd** and final accounting beginning with date of 01/01/16.

RECOMMENDATION:
Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400353

CASE NAME: Clinton Atterbury

SEE ALSO 34

HEARING:

Accounting Review

COUNSEL:

CLINTON ATTERBURY	(CEP)...	ROBERTA L. TAYLOR & ASSOC
PUBLIC GUARDIAN	(TC/PET)...	COUNTY COUNSEL
ROBERT L. TAYLOR	(PET)...	ROBERTA L. TAYLOR & ASSOC
ROSE GARDEN RESID. CARE	(PET/TP)...	SANDERS REHASTE STERNSH

XREF: CONPS1400354 *IDA ATTERBURY*

XREF: CONPS1400354

GENERAL INFORMATION

Continued from 04/11/16 11/07/16 and 07/10/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Public Guardian appointed on 02/02/15.
2. Need first accounting.

RECOMMENDATION

Inquire status. When documents are not filed as ordered, court may set a hearing in accord with Pr.C. §2655.

(dl/lc/nb/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400354

CASE NAME: Ida Atterbury

HEARING:
Accounting Review

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
IDA ATTERBURY	(CEP)...ROBERTA L. TAYLOR & ASSOC
ROBERTA L. TAYLOR	(PET)...ROBERTA L. TAYLOR & ASSOC
ROSE GARDEN RESID CARE	(PET)...SANDERS REHASTE STERNSHEIN

XREF: CONPS1400353 CLINTON ATTERBURY

GENERAL INFORMATION

Continued from 04/11/16,11/07/16 and 07/10/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Public Guardian appointed temporary conservator of the person and estate on 12/22/14 then general conservator on 02/02/15.
2. **Need** accounting beginning with date of 12/22/14.

RECOMMENDATION

Inquire status.

(dl/lc/nb/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1500136

CASE NAME: ERNEST CABRERA

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
ERNEST CABRERA (CEP/CEE)...HARTNELL LAW GROUP

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Public guardian appointed temporary conservator of the person and estate on 05/22/15 and general conservator on 07/17/15, no bond.
2. Reappointment hearing denied on 04/28/17.
3. Final Inventory and Appraisal filed 11/05/15.
4. Need 1st and Final Account beginning with 05/22/15.

RECOMMENDATION

Inquire status of accounting.
(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1500240

CASE NAME: PAUL N JONES

HEARING:
Accounting Review

COUNSEL:

ERIC H JONES	(PET)...
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
PAUL JONES	(CEP/CEE)...SHERRI L KASTILAHN
CHARLENE FLETCHER	(PRO/PER)

GENERAL INFORMATION

Continued from 05/22/17

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Public Guardian was appointed as temporary conservator of the person and estate on 12/14/15 and then general on 02/22/16.
2. Final Inventory and Appraisal filed 03/09/16.
3. **Need** Notice of Filing of Inventory and Appraisal and How to Object as to Charlene Fletcher (sister) per Pr. C. §2610(a).
4. **Need** First Account Current and Report beginning with date of 12/14/15.

RECOMMENDATION

Inquire status.

(lh/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1500357

CASE NAME: MTR OF MADELINE PRATKO

HEARING: Re: RECEIPT OF REPORT FROM CONNIE STRINGFELLOW

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
MADELINE M. PRATKO TRUST	(TRU)...
MADELINE MARY PRATKO	(CEE)...SANDY L. TURNER

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Re: Receipt Of Report From Connie Stringfellow

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

1. Matter set during accounting review on 01/29/18, wherein court ordered Connie Stringfellow to be personally present in court. Report re property to include listing information, taxes, insurance, house contents and is to be filed by 02/26/18, 4pm.
2. Need report. Nothing new filed.

RECOMMENDATION:

Court's discretion.

(cs)

Future Hearing: 11/05/18: Accounting Review

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600001

CASE NAME: MTR OF EMILY OCHOA-MILLER

HEARING:

Hearing re: Petition for authority to establish an Irrevocable Burial Trust.

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
EMILY OCHOA-MILLER (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition to establish Irrevocable Burial Trust by Public Guardian.

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

1. Petitioner alleges the current assets on hand are \$3,619.86, that there are sufficient funds to provide for conservatee's ongoing care and to establish a burial trust, and that the eligibility criteria for Social Security Disability does not allow for the recipient's account exceed \$2,000.
2. Petitioner requests authority to deposit up to \$5,000.00 in an Irrevocable Burial Trust.
3. Notice of Hearing filed 11/14/17 reflects a hearing date of 03/05/13 instead of 03/05/18. **JTD**
4. ~Proposed Order: 10/26/17

RECOMMENDATION:

Court's discretion.

(ww)

Future hearing dates: 03/09/18 Hearing re: Petition for reestablishment of conservatorship

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600079

CASE NAME: DAVID T HUANG

SEE ALSO 40

HEARING:

Hearing Re: OSC RE STATUS OF SALE OF HOUSE

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
DAVID T HUANG (CEP)...SANDY L. TURNER

XREF: CONPS1600080 GERALDINE HUANG

GENERAL INFORMATION

Continued from **11/13/17**. Court reviews the listing.

Continued from 01/29/18. Court ordered that the listing agent of the property to be personally present. Ramona Verduzco to give notice to listing agent.

THIS CASE SET FOR HEARING ON OSC re Status of House.

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

1. OSC set on 10/30/17 in regards to listing of house for sale.
2. Ms. Stringfellow is to be personally present if house has not been listed for sale.
3. Per 11/13/17 Court reviewed the listing.

RECOMMENDATION

Court's discretion re OSC.

(ww)

Future Hearing: 4/30/18: Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600080

CASE NAME: GERALDINE HUANG

SEE ALSO 39

HEARING:
OSC RE STATUS OF SALE OF HOUSE

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
GERALDINE HUANG	(CEP)...MITCHELL I ROTH
GERALDINE HUANG	(PET)...SHERRI L KASTILAHN
ARCHANGEL ESTATE PLANNING	(TP)...ARCHANGEL ESTATE PLANNING

XREF: CONPS1600079 DAVID T HUANG

GENERAL INFORMATION

Continued from **11/13/17**. Court reviews the listing.

Continued from 01/29/18. Court ordered that the listing agent of the property to be personally present. Ramona Verduzco to give notice to listing agent.

THIS CASE SET FOR HEARING ON OSC re Status of House.

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

1. OSC set on 10/30/17 in status of listing of house for sale and orders Ms. Stringfellow to be personally present in court on 11/13/17 if she has not listed the house for sale.
2. Per 11/13/17 Court reviewed the listing.
3. See previous matter.

RECOMMENDATION

Court's discretion re OSC.

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600150

CASE NAME: MTR OF ROBERT STAVERS

HEARING:

Hearing re: Petition for authority to establish an Irrevocable Burial Trust.

COUNSEL:

PUBLIC GUARDIAN
ROBERT STAVERS

(CPE)...COUNTY COUNSEL
(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire: 08/11/18

THIS CASE IS SET FOR HEARING ON Petition to establish Irrevocable Burial Trust by Public Guardian.

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

1. Petitioner alleges the current assets on hand are \$3,563.45, that there are sufficient funds to provide for conservatee's ongoing care and to establish a burial trust, and that the eligibility criteria for Social Security Disability does not allow for the recipient's account exceed \$2,000.
2. Petitioner requests authority to deposit up to \$1,800.00 in an Irrevocable Burial Trust.
3. Notice given.
4. ~Proposed Order:11/07/17

RECOMMENDATION:

Court's discretion.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600191

CASE NAME: RAFAEL ARREDONDO LOPEZ

SEE ALSO 43

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of AZUCENA ARREDONDO

COUNSEL:

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

GENERAL INFORMATION

Continued from 01/26/18. Court orders conservator to be personally present in Court on March 5, 2018 at 10:00am. Court sets Osc re suspension of conservator and appointment of public guardian as successor conservator for March 5, 2018 at 10:00am in department s35.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Azucena Arredondo, daughter, appointed conservator of the person only on 06/13/17, no bond.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 02/07/18; however, notice must be sent to all relatives within the 2nd degree. **Need** corrected notice sent to all 13 children of conservatee listed on List of Required Contact Information form.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 filed 09/12/17
4. Care Plan filed 09/12/17; however, signature is not dated. **JTD**

RECOMMENDATION

Need to clear note 2 then Court's discretion.

(nb/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600191

CASE NAME: RAFAEL ARREDONDO LOPEZ

SEE ALSO 42

HEARING:

Hearing Re: OSC RE SUSPENSION OF C'TOR/APPT OF PG

COUNSEL:

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

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON OSC re Suspension of Conservator/Appointment of PG.

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

1. OSC set on 01/26/18 when Azucena failed to appear at the hearing and probate notes have not been cleared.
2. Conservator Azucena was ordered to be personally present.
3. Court has discretion to remove conservator and appoint the PG if necessary.

RECOMMENDATION

Court's discretion re OSC.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600192

CASE NAME: MTR OF JENNIFER RAYANNE DURON

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
JENNIFER RAYANNE DURON (CEP)...

GENERAL INFORMATION

Letters expire 08/12/17.

Continued from 06/05/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Public Guardian appointed as Temporary Conservator of the Person and Estate on 07/15/16; then general conservator on 08/19/16.
2. Conservatorship was terminated on 12/02/16.
3. **Need** 1st and final accounting or waiver of account beginning with date of 07/15/16.

RECOMMENDATION:

Inquire status of accounting.

(nb/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600306

CASE NAME: MTR OF OLETA RUTH BELANGER

HEARING:

Petition for APPOINTMENT OF THE PUBLIC GUARDIAN AS SUCCESSOR
TRUSTEE

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
OLETA RUTH BELANGER (CEP)...

Currently under review by Legal Research

LR

Notice given.

(ww)

Future Hearing: 6/11/18: Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600330

CASE NAME: MTR OF TINA RODGERS

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
TINA RODGERS (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION
Letters expire on 01/06/18

THIS CASE IS SET FOR HEARING ON accounting review

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

1. PG appointed LPS conservator 11/10/16.
2. Final Inventory and Appraisal filed 06/08/17.
3. No accounting or waiver of account filed.

RECOMMENDATION:
Inquire status.
(cs)

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1700030
CASE NAME: EDDIE SWAFFORD

HEARING: Petition for Request for court order authorizing sale of conservatee's personal residence

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
EDDIE SWAFFORD (CEP)...ROSE C ROSADO

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Request for Authorization to Sell Conservatee's Personal Residence per Pr.C. § 2540(b) by the Public Guardian, Conservator of the person and estate.

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

1. **Conservatee passed away on 01/02/18.**
2. Petitioner proposes to sell the Conservatee's personal residence, located at 14780 New Castle Way, Victorville, located in San Bernardino, CA.
 - a. Per the Final Inventory and Appraisal filed on 09/21/17, it is indicated that the conservatee only owns ½ interest in the property valued at \$85,000.00.
 - b. Court to inquire if the owner of the other half consents to the sale. **JTD**
3. Petitioner believes that the sale is necessary in order to provide funds to pay ongoing expenses related to the care of the conservatee and that it is in the best interests of the conservatorship estate to sell the property.
4. Petitioner indicates that the conservatee has been informed and is not opposed to the proposed sale as the conservatee's condition prevents him from being able to live in the residence as he requires 24-hour care.
5. Notice given.
6. ~Proposed Order 11/02/17

RECOMMENDATION:

Petition appears to be moot as conservatee has passed away. Court's discretion.

(ww)

Future Hearing: 4/09/18: Petition for Attorney's Fees for Compensation for Services Rendered to Conservatee
6/11/18: Accounting Review

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: SC SS01542

CASE NAME: MATTER OF CHRISTIAN D THROOP

HEARING:

Petition for Appointment of Successor Conservator

COUNSEL:

DOLORES N KITE	(CPE)...J. DAVID HORSPOOL
CHRISTIAN D THROOP	(CEP)...MARK J. FLORY
ROBERT W KITE	(CP)...J. DAVID HORSPOOL

GENERAL INFORMATION

Continued from 12/04/17. Robert Kite to file by 4pm December 18, 2017 list of all family members of Christian Throop up to first cousins.

THIS CASE SET FOR HEARING ON Petition for Appointment of Successor Conservator person only by Robert Kite, conservator/step-brother to appoint PG.

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

1. Robert Kite was appointed as successor conservator of the person only on 03/28/16. Conservator seeks to resign effective upon appointment of the PG as successor as he is no longer able to fulfill the duties required. [LF pg. 5].
2. Notice of hearing and proof of service filed 11/13/17.
3. No Form Order Provided.

RECOMMENDATION

Court's discretion. If approved, set hearing for Compliance Review for **10/15/18** 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

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS01965

CASE NAME: MTR OF CHRIS GRANDE

HEARING:
Accounting Review

COUNSEL:

ROBETTE GRANDE	(CPE)...PRO/PER
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
CHRISTOPHER GRANDE	(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expired 10/16/18

Continued from 06/05/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Fifth Account entered 03/15/16; account or waiver of account now due beginning 12/01/15.

RECOMMENDATION:

Inquire status.

(nb/cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS02249

CASE NAME: MTR OF PRASENJIT CHAKRABARTI

HEARING:

Accounting Review

COUNSEL:

TAPAN CHAKRABARTI

(CPE)...PRO/PER

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

PRASENJIT CHAKRABARTI

(CEP)...HARTNELL LAW GROUP

5th Waiver of Account sent to department for signature on 02/21/18. Clerk's office to set next Accounting review for 04/08/19.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS02391

CASE NAME: MTR OF TAMICA DAWSON

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
TAMICA DAWSON (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expired 03/13/18.

Continued from 10/03/16, 04/17/17 and 11/13/17.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Ex Parte Order that Conservator need not present 11th Account entered 10/13/15.
2. **Need** 12th account or waiver of account beginning with 08/01/15.

RECOMMENDATION

Inquire status of accounting.

(lc/nb/ww)

Future hearing dates: 03/09/18 Hearing re: Petition for reestablishment of conservatorship

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS02948

CASE NAME: MTR RE BRANDY LEIGH MOORE

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

BRANDY MOORE

(CEP)...HARTNELL LAW GROUP

11th Waiver of Account sent to department for signature on 02/27/18. Clerk's office to set next Accounting review for 02/25/19

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS02996

CASE NAME: MTR RE SEAN COOPER

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

SEAN COOPER

(CEP)...HARTNELL LAW GROUP

12th Waiver of Account sent to department for signature on 02/27/18. Clerk's office to set next Accounting review for 03/04/19.

(cs)

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS02467

CASE NAME: MTTR RE ROBERT MIX

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
ROBERT MIX (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION
Letters expire 07/28/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present twelfth Account entered 07/03/17; account or waiver of account now due.

RECOMMENDATION:
Inquire status.
(cs)

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS02672

CASE NAME: MATTER OF DIXIE NICHOLSON

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
DIXIE NICHOLSON (CEP)...HARTNELL LAW GROUP

Ex Parte Order that Conservator need not present 7th Account by PG approved and forwarded to Department for signature. Next Accounting Review date to be set on **04/15/19**.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS02946

CASE NAME: MTR RE KENT LUNDWALL

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

KENT LUNDWALL

(CEP)...HARTNELL LAW GROUP

Ex Parte Order that Conservator need not present 6th Account by PG approved and forwarded to Department for signature. Next Accounting Review date to be set on **04/15/19**.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS02767

CASE NAME: MATTER OF RAMONA CAMPBELL

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

RAMONA CAMPBELL

(CEP)...HARTNELL LAW GROUP

OFFICE OF ADMINISTRATIVE HEARINGS

(RES)...PRO/PER

JAMES OLALIA

(MICHAEL B LEVIN)

GENERAL INFORMATION

Letters expire 12/18/18.

Continued from 07/31/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present 8th account by PG approved on 01/16/15.
2. **Need** 9th account or waiver of accounting beginning with date of 12/01/14.

RECOMMENDATION:

Inquire status.

(nb/ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS02160

CASE NAME: MTR OF VICTOR VIALLIANT

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

VICTOR BAILLAND

(CEP)...HARTNELL LAW GROUP

Ex Parte Order that Conservator need not present 8th Account by PG approved and forwarded to Department for signature. Next Accounting Review date to be set on **04/15/19**.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS02382

CASE NAME: MTR OF JONATHAN RISTER

HEARING:

Accounting Review

COUNSEL:

DEPT. CHILDREN'S SERVICE

(CPE)...COUNTY COUNSEL

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

JOHNATHAN RISTER

(CEP)...HARTNELL LAW GROUP

Ex Parte Order that Conservator need not present 7th Account by PG approved and forwarded to Department for signature. Next Accounting Review date to be set on **04/15/19**

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS4264

CASE NAME: MTR OF LINDA AUSTIN

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

LINDA AUSTIN

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 01/26/19

On 07/31/17 matter was reset to 03/05/18 at request of PG

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Seventh Account entered 07/28/16; account or waiver of account now due.

RECOMMENDATION:

Inquire status.

(nb/cs)

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS4854

CASE NAME: IN THE MATTER OF SAMUEL COOKS

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
TERRY S COOKS (CEP)...HARTNELL LAW GROUP

9th Waiver of Account sent to department for signature on 02/28/18. Clerk's office to set next Accounting review for 03/04/19.

(cs)

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS01449

CASE NAME: IN THE MATTER OF STEVEN PACE

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
STEVEN PACE (CEP)...HARTNELL LAW GROUP

18th Waiver of Account sent to department for signature on 02/28/18. Clerk's office to set next Accounting review for 03/04/19.
(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS4557

CASE NAME: IN THE MATTER OF ROGER OELHAFEN

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN
ROGER OELHAFEN

(CPE)...COUNTY COUNSEL
(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION:

Letters expired: 4/5/16

Continued from 06/08/15, 11/09/15, 03/07/16,12/19/16 and 06/05/17 at request of counsel. No further continuances will be granted.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present 29th account by PG approved on_09/12/14.
2. **Need** 30th Account/Waiver of account beginning with date of 03/27/14

RECOMMENDATION

Court's discretion.

(gls/vet/dl/nb/ww)

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

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

DATE: 03/05/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS1803

VACATE

CASE NAME: IN THE MATTER OF DIANE ABEND

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
DIANE ABEND (CEP)...HARTNELL LAW GROUP

40th Waiver of Account sent to department for signature on 02/28/18. Clerk's office to set next Accounting review for 03/04/19.

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 03/05/18 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1600862

CASE NAME: MTR OF IONA FAYE McKNIGHT JAMES

VACATED

HEARING:

Hearing Re: COURT TRIAL (FIRST DAY OF TRIAL)

COUNSEL:

PATRICIA A BROWN

(PET)...PRO/PER

IONA FAYE MCKNIGHT JAMES

(DEC)...

SAULETA JAMES

(PET/OBJ)...GUAGENTI & DAMSKY

(ww)

Future Hearings: 4/04/18 Petition for Approval of Settlement Agreement Re:will Contest and Granting of Contestant's Petition etc

4/04/18 Hearing re: Petition for Letters of Admin. W/ Limited Authority under

4/04/18 Petition for PROBATE OF WILL & FOR LTRS OF ADMINISTRATION W/WILL ANNEXED

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

CONSERVATORSHIPS

DATE: 03/05/18 TIME: 8:30 DEPT: S36P

CASE#: CON PS1200195

CASE NAME: CATHY GARCIA

HEARING:

Hearing Re: Status on Special Needs Trust

COUNSEL:

EUSEBIA GARCIA

(CP)...PRO/PER

CATHY GARCIA

(CTP)...

No Notes-Status- JTD.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S36P

CASE#: CON PS1600055

CASE NAME: RAY R RAMOS

HEARING:

Motion Re: RECONSIDERATION AND ORDR SETTING TRIAL MEMO POINTS
AND AUTHORITIES Filed by Petitioner RETA R RIOS

COUNSEL:

RETA R RIOS	(CPE)...BRYAN C HARTNELL
RAY R RAMOS	(CEP)...E JOAN NELMS

Currently under review by Legal Research

LR

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S36P

CASE#: CON PS1600305

CASE NAME: MTR OF VANESSA HERNANDEZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ALEJANDRA MIRAMONTES

COUNSEL:

ALEJANDRA MIRAMONTES (CP)...PRO/PER
JOSE CARLOS HERNANDEZ (CP)...PRO/PER
VANESSA HERNANDEZ (CTP)...SHERRI L KASTILAHN

GENERAL INFORMATION

Continued from **09/11/17** and **11/06/17**. Attorney Kastilahn to contact her clients and file required documents.

Continued from 01/22/18.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Alejandra and Jose Carlos Hernandez, parents, appointed as limited co-conservators of the person only on 02/06/17.
2. Determination of Conservatee's Appropriate Level of Care form GC-355 filed 11/06/17.
3. Notification of Conservatee's rights per Pr.C.§1830(c) filed on 02/16/17.
4. **Need** Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION

Need to clear note 4.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 03/05/18 TIME: 8:30 DEPT: S36P

CASE#: CON PS1800024

CASE NAME: FREDERICK VIJAY ANGANU

VACATED

HEARING:

Petition for Appointment of Conservator

COUNSEL:

SAROJNI ANGANU

(PET)...PRO/PER

FREDERICK VIJAY ANGANU

(CEE)...

Request for dismissal as to entire action filed 02/16/18.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

PROBATE

DATE: 03/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1200084

CASE NAME: NORA ANITA ABRAMS LIVING TRUST

SEE ALSO 6

HEARING:

Hearing re Final Discharge

COUNSEL:

MARY SCHOENDIENST (PET)...BLUMBERG LAW CORPORATION
THE NORA ANITA ABRAMS REVOCABLE TRUST (TRU)...
ROBERT J SPITZ (PET)...BRIAN CHANG
LOIS LEFLAR (PET)...ROBERT M EBINER
STAPHANIE GILES (OBJ)...MATTHEW E SHEASBY

X REF: CIVRS1108600 (Nora Adams –v- Mary Schoendienst) **CONPS1200152** (Nora Abrams)

GENERAL INFORMATION:

Continued from 2/2/16 and 04/20/16. The court is advised the status report was filed 04/15/16.

THIS CASE IS SET FOR HEARING ON Final Discharge of Temporary, Interim Trustee of “The Nora Anita Abrams Revocable Trust dated July 25, 2011”

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

1. First and Final Account of Temporary Interim Trustee was approved on 12/11/14. Order Settling First and Final Account of Temporary, Interim Trustee filed 12/18/15.
2. Receipt filed 12/11/15.
3. **Need** Ex-parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb/sa/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1200084

CASE NAME: NORA ANITA ABRAMS LIVING TRUST

SEE ALSO 5

HEARING:

Hearing re Final Discharge

COUNSEL:

MARY SCHOENDIENST (PET)...BLUMBERG LAW CORPORATION
THE NORA ANITA ABRAMS REVOCABLE TRUST (TRU)...
ROBERT J SPITZ (PET)...BRIAN CHANG
LOIS LEFLAR (PET)...ROBERT M EBINER
STAPHANIE GILES (OBJ)...MATTHEW E SHEASBY

X REF: CIVRS1108600 (*Nora Adams –v- Mary Schoendienst*) **CONPS1200152** (*Nora Abrams*)

GENERAL INFORMATION:

Continued from 04/20/16.

THIS CASE IS SET FOR HEARING ON Final Discharge of Trustee of "The Nora Anita Abrams Irrevocable Trust dated July 12, 2013"

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

1. First and Final Account of Trustee was approved on 12/11/14. Order Settling First and Final Account of Trustee filed 12/18/15.
2. Receipts filed by Distributees on 12/11/15.
3. **Need** informal accounting and receipt(s) as to how the \$20,000 reserve was expended or distributed.
4. **Need** Ex-parte Petition/Order for Final Discharge.

RECOMMENDATION:

Need to clear notes 3 & 4.

(nb/sa/ww)

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

DATE: 03/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400386
CASE NAME: William Arthur Lee

HEARING: Probate status report filed.

COUNSEL:

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

THIS CASE IS SET FOR HEARING ON Status Report.

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

1. Letters of Special Administration issued to Christian on 08/06/14, \$50,000 bond. Second Amended Letters of Special Administration issued to Christian on 01/21/15, \$100,000 bond. Third Amended Order for Letters of Special Administration to Christian entered 05/11/15, \$100,000 bond (no letters). Order Removing Special Administrator Christian entered 02/08/16 (PA appointed Special Administrator). PA was replaced with Christian after trial on 02/06/17. Letters of Administration issued to Christian Dymally-Lee, son, on 05/25/17; full authority, \$100,000 bond.
2. First and Final Account by Christian as special administrator approved on 04/18/17.
3. Petitioner requests an additional 9 months to close the estate.
4. Estate is not in a condition to close as petitioner is waiting for the PA to file an accounting for period beginning 03/30/16. Funds from PA will not be delivered to the petitioner until the accounting is approved.
5. Petitioner will be able to move forward with the necessary actions to close the estate once the funds are received.
6. No proposed order. Submit order after hearing.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review for **12/10/18**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(ww)

Future hearing dates: 03/19/18 Accounting Review **by PA as special administrator**

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400536

CASE NAME: ELLEN R WHITE

HEARING:
Hearing re Final Discharge

COUNSEL:

BONNIE JONES	(PET)...	LAW OFFICES OF RYAN S CARRIGAN
ELLEN R WHITE	(DEC)...	
BERNARD M BIDART	(TP)...	

GENERAL INFORMATION

Continued from **12/04/17**. Nonappearance and final discharge has not been filed.
Continued from 01/22/18.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Bonnie Jones, daughter, approved on 11/30/16.
2. No receipts needed as only real property remains.
3. **Need** Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b).

RECOMMENDATION

Inquire status.

(ww)

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

DATE: 03/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400726
CASE NAME: Abraham C. Ramirez

HEARING: Hearing Re: First and Final Account (Dorothy Harmon)

COUNSEL:

DOROTHY R HARMON (PET)...JENNIFER M DANIEL
ABRAHAM C. RAMIREZ (DEC)...
PUBLIC ADMINISTRATOR (PET)...CRAIG M PARKER

GENERAL INFORMATION

Continued from **02/02/17 and 03/23/17**. Court order the administrator, Dorothy Harmon to pay back the administrator fees that she paid herself without prior court order. Court notifies the Public Administrator of possible appointment. If a proper accounting is not filed prior to the next hearing the court shall appoint the Public Administrator as the successor administrator.

Continued from **05/11/17**. A request for continuance was received. The court suspends the powers of the administrator. The Public Administrator is appointed as the Special Administrator. Notice by Judicial Assistant.

Continued from **07/11/17**. Craig Parker represents all assets were distributed to prior administrator. Matter is continued by the Court to allow petitioner to file proper accounting.

Continued from **09/12/17**. Matter is continued. Dorothy Harmon states that she is retaining Attorney Jennifer Daniel. Dorothy Harmon is collecting the documents that counsel has requested.

Continued from **11/28/17** Waiver of accounting out for signature.

Continued from 01/22/18 Waiting on signatures on waivers.

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees by prior administrator, Dorothy Harmon ["Petitioner"].

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

1. It cannot be determined if the accounting balances as it does not comply with Pr.C.§10900 and Pr.C.§1060 et. seq. **Need** a proper summary of account, report and accounting schedules.
2. **Need** verification per Pr.C. § 1021.
3. Proposed order is not proper.

RECOMMENDATION

Need to file a proper accounting and report.

(lc/nb/ww)

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

DATE: 03/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1501044

CASE NAME: DAVID M. BROWN

HEARING:

Verified First and Final Account and Report of VICKI G BROWN and
Petition for allowance of fees filed.

COUNSEL:

VICKI G BROWN	(PET)...SUZANNE M GRAVES
MATISON R BROWN	(PET)...SUZANNE M GRAVES
DAVID M BROWN	(DEC)...
JESSICA BROWN	(OBJ)...JOELLE LEE A. NICHOL

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account; for Final Distribution, for reimbursement of funds advanced by Administrator, and Petition for Fees by Vicki Brown, spouse

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

1. Accounting period: 10/14/15-12/15/17
2. Assets on hand: \$13,854.74 in cash.
3. Current bond is \$46,000.00.
4. Petitioner and Attorney request statutory fees of \$3,285.49. Calculated.
5. Petitioner requests reimbursement for costs in the amount of \$4,922.42. Itemized. [LF pgs. 125-127]
6. Petitioner indicates that estate is ready to close; however, there is an anticipated Federal tax return of \$4,276.00 that has not been received but is listed in the omnibus clause. [LF pg. 11] **JTD**.
7. Petitioner requests that reimbursement of \$534.60 paid for the commemorative urn should be allowed to Matison Brown, son, even though a creditor claim wasn't filed. Receipt is attached. [LF pg. 123] **JTD**
8. Petitioner indicates that several preliminary distributions of personal property were made prior to letters being issued per signed settlement agreement dated 03/03/16 between the heirs.

- a. Other than the Ford F150 Truck, the items that were distributed were not appraised and a petition to make the distributions per Pr.C. § 11620 was not filed. [LF pg. 9] **JTD**
 - b. Petitioner indicates that no harm was done to the estate.
 - c. Several firearms were distributed per the agreement; however, firearms must be sold to dealer. **Need** verified supplement regarding compliance with Penal Code §§ 27875 and/or 27920 for the alleged firearm transfers.
9. "Exhibit E re: Distributions during accounting period" does not list all items and values of the property that were previously distributed. **JTD See note 8.**
 10. Petitioner requests a reserve of \$500 to cover the filing fee for this accounting and for a certified copy of the order for final discharge. **JTD**
 11. Notice of hearing filed 01/24/18; however, the document title indicated that the "Verified supplement to verified first and final account..." is set for hearing when there is only a hearing on the Verified First and Final Account. **JTD**
 12. **Objections to accounting by Jessica Brown, daughter, filed 01/17/18.**
 13. **Response by Vicki Brown to objections filed 01/24/18; however, Attorney Mary Ireland failed to date at signature line. JTD**
 14. **Response by Jessica Brown to response to objections by Vicki Brown filed 02/14/18.**
 15. No proposed order. Submit order after hearing.

RECOMMENDATION:

Matter is contested. Need to clear note 8c then Court's discretion re remaining notes. If approved, Court to set hearing on filing of receipts and final discharge for **03/11/19**.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600150

CASE NAME: DAREL STEVEN McNORTON

HEARING:
Accounting Review

COUNSEL:
WILLIAM SWIM (PET)...PRO/PER
DAREL STEVEN MCNORTON (DEC)...

GENERAL INFORMATION:

Continued from **06/13/17** Court directs the administrator to file an Inventory & Appraisal forthwith as it has not been filed as of yet.

Continued from **08/22/17**. No appearance nor has the accounting been filed. Court orders William Swim to personally be present at next hearing. Notice by Judicial Assistant.

Continued from **10/10/17** Court orders William Swim to be present.

Continued from 12/18/17. I&A needs to be completed by a probate referee.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters Testamentary issued to William Swim, friend/executor on 04/19/16, full authority, no bond.
2. Final Inventory and Appraisal filed 10/10/17; however, assets other than cash must be appraised by a Probate Referee. **Need** corrected Final Inventory and Appraisal.
3. **Need** accounting or status report.

RECOMMENDATION:

Need to clear note 2 and 3. Court's discretion

(nb/cs/nb/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700556

CASE NAME: MTR OF JOHN JACOBBER

HEARING:

first and final Account and Report of RENE JACOBBER and Petition
for allowance of fees filed.

COUNSEL:

RENE JACOBBER (PET)...J PATRICK RAGAN
JOHN JACOBBER (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account, final distribution and
Petition for Fees by Rene Jacobber, executor/brother

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

- 1 Assets on hand: \$1,914,107.68 in case and annuities.
- 2 Petitioner and Attorney request statutory fees of \$32,141.07 each. Calculated.
- 3 Petitioner requests a reserve of \$2,000.00 for the preparation of the final income tax return. **JTD**
- 4 Notice given.
- 5 Proposed Order: 01/03/18; however, is missing statements re: creditor's claims, taxes/debts paid, notice per Pr.C. § 9202, assets on hand, request for reserve of \$2,000, and omnibus clause that was indicated in the petition.

RECOMMENDATION:

Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge
for **033/11/19**.

(ww)

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

DATE: 03/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700715

CASE NAME: DAVID ROLLER

SEE ALSO 14

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS TESTAMENTARY filed
by ELAINE ELIZABETH KENDRICK

COUNSEL:

LISA DAVIS UNGER (PET)...MARK W REGUS
DAVID ROLLER (DEC)...
ELAINE ELIZABETH KENDRICK (PET)...OLDMAN COOLEY SALLUS BIRNBERG

GENERAL INFORMATION

Continued from **09/25/17** as Mr. Oldman will be filing a new petition.

Continued from **11/20/17**.

Continued from 01/09/18. Counsel states possible settlement.

THIS CASE SET FOR HEARING ON

- Petition 1- Petition for Probate, Letters Testamentary with Full Authority under IAEA by ***Lisa Davis Unger, step-daughter/ co-executor***
- Petition 2- Petition for Probate, Letters Testamentary with Full Authority under IAEA by ***Elaine Kendrick, daughter/executor***

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

Petitioner 1- Lisa Davis Unger, step-daughter/ co-executor

1. Will dated 12/28/07 waives bond. The estate consists of **\$1,760,000.00** of which \$1,260,000.00 is personal property. The Court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(c).
2. Section 8 fails to provide the ages of all listed persons. **Need** verified supplement.
3. **Need** declination to act by named co-executor Elaine Kendrick.
4. **Need** Notice to Petition to Administer Estate and proof of service.
5. **Need** proof of publication
6. Supplemental petition filed also on 07/19/17 requests that Lisa be appointed as the sole executor.

- a. Exhibit A is not attached.
 - b. No fee was taken or hearing set for the petition. Court may wish to require that fee be submitted and hearing set.
7. ~Proposed Form Order: 07/19/17

Petitioner 2- Elaine Kendrick, daughter/executor

8. Will dated 04/28/10 waives bond. The estate consists of **\$2,500.00** in personal property. The Court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(c). Court may wish to clarify estimated amount of estate property as there is a substantial difference in value indicated on the current petitions filed.
9. ~Proposed Form Order: 09/28/17

RECOMMENDATION

Matter is contested. Need to clear notes 2-5. Court's discretion re bond and note 6. If approved, set Accounting/Status Review for **01/28/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/nb/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700715

CASE NAME: DAVID ROLLER

SEE ALSO 13

HEARING:

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

COUNSEL:

LISA DAVIS UNGER	(PET)...MARK W REGUS
DAVID ROLLER	(DEC)...
ELAINE ELIZABETH KENDRICK	(PET)...OLDMAN COOLEY SALLUS BIRNBERG

See notes on matter 13.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 03/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701065

CASE NAME: ESTATE OF LINDA MARIE ROSALES

HEARING:

Hearing Re: Preliminary Injunction (Restraining Order)

COUNSEL:

MICHAEL A ROSALES (PET)...PRO/PER

LINDA MARIE ROSALES (DEC)...

No Notes- JTD.

(ww)

Future Hearing: 4/01/18: Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701244

CASE NAME: EVELYN A STONE

HEARING:

Petition for By Claimant to Determine Ownership of Estate
Property and for Court etc

COUNSEL:

JAMES L STONE JR (PET)...COURTNEY F WRITER
EVELYN A STONE (DEC)...

Currently under review by Legal Research

LR

NOTICE:

Notice given.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800114

CASE NAME: CAROLYN ANN VALENCIA

HEARING:

Petition for letters testamentary w/ full iaea

COUNSEL:

TAREE HERRINGTON (PET)...FULLERTON LEMANN SCHAEFER & DO
CAROLYN ANN VALENCIA (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Taree Harrington, daughter

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

1. Will waives bond. Net value of the estate consists of \$290,000 in real property. Petitioner is a non-resident and the court may require bond if the proposed personal representative resides outside California per Pr. C. § 8571. Court also has discretion to require bond per Pr.C. § 8481(b).
2. Declination to serve as executor by Jerome is attached to the petition.
3. Declination by named co-alternate executor David Catalina to act filed 02/02/18.
4. Section 8 of the petition fails to list all persons mentioned in the will. **Need** verified supplement as to Jerome Coleman, brother/named executor.
5. ~Proposed Form Order: 02/02/18

RECOMMENDATION

Need to clear note 4. Court's discretion re bond. If approved, set Accounting/Status Review for **05/13/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S36P

CASE#: TRU PS1800016

CASE NAME: TRUST OF ESTELLA J TELLO

HEARING:

Petition for Determine Real Estate Interest of Trust (PC 850
HEGGSTAD)

COUNSEL:

ARLEEN TELLO (PET)...SELTERS & SELTERS
TRUST OF ESTELLA J TELLO (TRU)...

Currently under review by Legal Research

LR

NOTICE:

Notice given.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 03/05/18 TIME: 8:35 DEPT: S36P

CASE#: TRU PS1800025

CASE NAME: HINKLE FAMILY TRUST

HEARING:

Petition for TO DISTRIBUTE DECEDENT'S ASSETS TO TRUST

COUNSEL:

BETTY L POUND (PET)...THOMAS L MARSHALL
HINKLE FAMILY TRUST (TRU)...

Currently under review by Legal Research

LR

NOTICE:

Notice given.

(ww)

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

DATE: 03/05/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600250

SEE ALSO 20A

CASE NAME: SYBIL JOYCE MUMMERT

HEARING:

Petition for attorney's fees

COUNSEL:

MICHAEL C. SNOW (PET)...HARTNELL LAW GROUP
SYBIL JOYCE MUMMERT (PET/CEE)...BROWN WHITE & NEWHOUSE, LLP

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Mark Flory.

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

1. Petitioner, Mark Flory, was appointed counsel on 10/11/16.
2. Petitioner requests total fees of \$2,576.36 which includes fees of \$1,893.86 for 8.7 hours at \$105/300 per hour for paralegal and attorney services and anticipated additional fees of \$682.50 for 1.5 hours of paralegal work at \$105/hour and 1.5 hours of attorney work at \$350/hour. Itemized and anticipated fees are generally described [Pet. LF pgs. 8-10]. **JTD**
3. Notice of hearing and proof of service filed 01/24/18; however, the court address is incorrect. **Need** corrected notice.
4. ~Proposed Order: 01/23/18

RECOMMENDATION

Need corrected notice.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 20A Add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 03/05/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600250

SEE ALSO 20

CASE NAME: SYBIL JOYCE MUMMERT

HEARING:

Accounting Review

COUNSEL:

MICHAEL C. SNOW

(PET)...HARTNELL LAW GROUP

SYBIL JOYCE MUMMERT

(PET/CEE)...BROWN WHITE & NEWHOUSE, LLP

GENERAL INFORMATION

Continued from 02/22/18 to be heard same day as the petition for attorney fees.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. **Conservatee passed away on 09/20/17.**
2. Michael Snow, son, appointed conservator of the estate only on 12/15/16, \$322,000 bond.
3. Final Inventory and Appraisal filed 02/06/18.
4. **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610 for final Inventory and Appraisal.
5. **Need** 1st and final accounting.

RECOMMENDATION

Need to clear notes 4-5.

(lc/ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIPS**

DATE: 03/05/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600364

CASE NAME: MTR OF NESTOR JOSUE VEGA

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CRISTINA PALACIO-MOLINA (CP)...PRO/PER

ARTURO VEGA AVILA (CE)...PRO/PER

NESTOR JOSUE VEGA (CEE)...

Waiver of Court Fees and Costs filed by NESTOR JOSUE VEGA is GRANTED

XREF: FAMRS1302381 *IKZURY ADAI VEGA PALACIOS -V- NESTOR JOSUE VEGA*
FWV1401723
16CR-059491

GENERAL INFORMATION

Ex parte orders granted 01/04/17: Petitioners appointed temporary co-conservators of the person only (order filed 01/04/17; letters issued 01/04/17).

Continued from **01/30/17, 02/27/17 and 04/17/17** for proper notice. Court waives the return of the citation as the proposed conservatee Nestor Josue Vega is present in court. Attorney E Joan Nelms to file a written report.

Continued from **06/26/17**. Written report received from E. Joan Nelms. Court referred matter to CI as proposed conservatee is out of custody and residing with his parents. Notice as to the proposed conservatee was cleared as he was present in Court.

Continued from **09/18/17**. Court sets deadline to file and serve a verified supplement no later than 10/17/17. All existing temporary orders shall remain in full force and effect 11/06/17.

Continued from 11/06/17. E. Joan Nelms removed as attorney for conservatee. Temporary letters to continue in full force and effect.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by Cristina Palacio-Molina and Arturo Vega Avila (parents).

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

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.

1. Cristina Palacio-Molina and Arturo Vega Avila appointed temporary conservators of person only 01/04/17.
2. Petitioners request no bond, as Conservatee has no estate, only a bank account with a negative balance. Question the need for estate powers. - **JTD**
3. Section 8 of petition does not list all names of the relatives to the 2nd degree per Pr.C. §1821(b). **Need** verified supplement.
4. **Need** Notice of hearing to Arriany, Leilani and Angelina Vega.
5. **Need** capacity declaration to support requests for powers under Pr.C. § 1873/1901, Pr.C. § 2351-2358, and 2355.
6. Report of Counsel E Joan Nelms filed 06/26/17.
7. CI report filed 08/25/17.
8. Certificate of completion of conservatorship course by Christina filed 01/30/17.
9. ~Proposed Form Order: 02/27/16.

RECOMMENDATION:

Need to clear notes 3-5. If approved, set hearing for Compliance Review for **10/15/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Care Plan per Pr.C.§2352.5; recordation of letters if applicable per Pr.C.§2313.

If estate powers granted requires: Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§ 2610, and set an Accounting Review for **05/13/19**.

(lh/nb/lh/cs/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700425

CASE NAME: SYLVESTER S BARS

HEARING:
PROBATE/CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:

ARTHUR A CAPPILLA (CPE)...BARBARA E BOWERSOCK
SYLVESTER S BARS (PET/CEP)...LENITA A SKORETZ

XREF: RCRS00611 SYLVESTER S BARS

GENERAL INFORMATION

Continued from 01/22/18. Amended letters to be filed.

THIS CASE IS SET FOR HEARING ON Conservatorship Management Conference

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

1. Arthur Cappilla, PPF, was appointed conservator of the person and estate on 02/09/07 by Superior Court of San Bernardino County in previous case # **RCRS00611**.
2. Case was ordered to be transferred to Los Angeles County on 03/01/16 and conservatee was residing in Long Beach.
3. Matter was ordered to be transferred back from Los Angeles County on 10/25/17 as conservatee resides in Fontana.
4. **Need** amended Letters to reflect this county.

RECOMMENDATION

Inquire status.

(ww)

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

DATE: 03/05/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700450

CASE NAME: MONICA GAZANFARI

HEARING:

Petition for Appointment of Conservator

COUNSEL:

YADIE GAZANFARI (CP)...PRO/PER
MINA ASKARI (CP)...PRO/PER
MONICA GAZANFARI (CTP)...DONNASUE ORTIZ

GENERAL INFORMATION

Continued from 01/17/18. Donnasue Ortiz appointed for Monica.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Yadie Gazanfari and Mina Askari, parents

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, make and consent to all medical decisions, and limit right to contract. **JTD**
2. Petitioner seeks medical powers. Capacity Declaration filed 12/13/17.
3. Proposed conservatee is developmentally disabled. **Need** report of counsel Donnasue Ortiz.
4. Proposed conservatee is developmentally disabled.
 - a. Court to see Letter from IRC filed 02/22/18. **Need** IRC report.
5. **Need** Confidential Screening Form by Mina Askari.
6. **Need** return of citation.
7. List of required contact information filed 12/13/17 is missing parents and paternal grandparents. **Need** completed form.
8. **Need** Notice of hearing and proof of service as to all relatives listed in petition within the 2nd degree, or file Due Diligence Declarations. Note: Notice to include at least 30 days' notice to Inland Regional Center.
9. Certificate of Completion of the Conservatorship Training Class filed 12/15/17.
10. CI report filed 01/11/18.
11. ~Proposed Form Order: 12/13/17

RECOMMENDATION

Need Report of counsel, IRC report and to clear notes 5-8. If approved, set hearing for Compliance Review for **10/15/18** 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/ww)

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

DATE: 03/05/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800016

CASE NAME: RITA STULLER

HEARING: Petition for Appointment of Conservator

COUNSEL:

KRISTEL MELDRUM (PET)...PRO/PER
RITA STULLER (CEE)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Kristel Meldrum, daughter.

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

1. Petitioner requests that bond not be required but attachment 1c re: reasons why is missing. Court may wish to inquire, or in alternative, need verified supplement.
2. Petitioner indicates that proposed conservatee lacks capacity to give informed consent to treatment; however, medical powers are not being requested in section 1g. Court to inquire. **If** they are being requested then need Capacity Declaration.
3. Confidential Screening form filed; however, signature is dated with future date of 01/22/19. **JTD**.
4. Petitioner seeks dementia powers. **Need** appointment of counsel for report.
5. Section 3f is marked; however, **need** attachments 3f(1) and 3f(2) as to proposed conservatee's relatives and proposed conservatee's preferences concerning appointment.
6. List of Required Contacts is filed; however, it does not match the petition. **Need** completed form to include all relatives within the 2nd degree.
7. **Need** Notification of Court of Conservatorship Address. (Local form SB-14522)
8. Confidential Supplemental form incomplete as to section 2, 4c1, and 5. **Need** completed form.
9. **Need** return of Citation.
10. **Need** Notice of Hearing and proof of service.
11. Certificate of Completion of the Conservatorship Training Class filed 02/13/18.
12. CI report filed 02/15/18.
13. No Form Order Provided.

RECOMMENDATION

Need to clear notes 4-10. Court's discretion re notes 1-3. If approved, set hearing for Compliance Review for **10/15/18** 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

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **PROBATE**

DATE: 03/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400737

CASE NAME: Luke Michael Gonzalez Special Needs Trust

HEARING: THIRD Account and Report of WELLS FARGO BANK and Petition for allowance of fees filed.

COUNSEL:

IRENE GONZALEZ (PET)...BRUCE G FAGEL & ASSOCIATES
LUKE MICHAELGONZALEZ SPECIAL NEEDS TRUST (TRU)...
WELLS FARGO BANK (PET/TEE)...HESS-VERDON & ASSOCIATES

XREF: CIVDS918069 GONZALEZ-V-LLUMC ET AL

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 3rd Account Current and Petition for Allowance of Fees by Wells Fargo Bank, beneficiary is 8.

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

1. Accounting period 10/01/16 – 09/30/17.
2. Assets on hand \$829,797.41 of which \$30,744.23 is in cash.
3. Trustee is seeking fees already taken of \$13,032.95 of at a rate of 1.5% annually for the first \$2M. JTD
4. Attorney is requesting fees of \$5,475.00 for 16.25 hours at \$375 per hour and costs of \$1,215.98. Itemized [Acct.11/22/17 LFpg 78-79]. Reimbursement of costs include monthly charges for postage and copying costs, per Local Rule 20-909 such costs are generally not allowed. JTD
5. **Need** bank statements per Local Rule 20-908.
6. Petitioner requests accountings to be filed biennially. JTD
7. Risk Management Strategies Inc. was paid \$28,641.19 during the accounting period.
8. Notice of given.
9. No proposed order. Submit after hearing.

RECOMMENDATION

Need to clear notes 5. If approved, set hearing on the next accounting review for **11/26/18** (if one year) or **11/25/19** (if two years). Accounting to be filed 30 days in advance.
(cs)

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 03/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600078

CASE NAME: JOHN HANF

HEARING: Accounting Review

COUNSEL:

PAT PERLEY (PET)...MITCHELL I ROTH
JOHN HANF (DEC)...
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP)...
SCOTT A HANCOCK (SNYDER & HANCOCK)

GENERAL INFORMATION

Continued from 05/23/17, 08/01/17 and 12/05/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Court appointed Pat Perley as administrator with full authority, \$220,000 bond. Letters issued 01/27/16.
2. Partial Inventory and Appraisal filed 05/31/16. Need Final Inventory and Appraisal.
3. Need accounting or status report.

RECOMMENDATION

Inquire status.
(lh/nb/cs)

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

DATE: 03/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600777

CASE NAME: EDWARD BENJAMIN FORSTALL

HEARING: FINAL DISTRIBUTION OF WAIVER OF ACCOUNTING Account and Report of RICHARD ELDON FORSTALL, DONNA JEAN FORSTALL and Petition for allowance of fees filed.

COUNSEL:

RICHARD ELDON FORSTALL	(PET)...PRO/PER
DONNA JEAN FORSTALL	(PET)...PRO/PER
EDWARD BENJAMIN FORSTALL	(DEC)...
SURETEC INSURANCE CO	(TP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petitioner for Final Distribution-on Waiver of Accounting, Waiver of Statutory fees, and Report of executors, by Richard Forstall and Donna Forstall

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

1. Heir waives accounting.
2. Assets on Hand \$76,203.37 consisting of cash \$326.23 in cash and rest in stocks and household personal effects.
3. Bond of \$20,000. Suggest bond of 76,203.
4. No statutory fees requested.
5. Petitioner indicates estate is decedent's property; however, **need** findings re character of estate whether: sole and separate property or community, per Local Rule 20-906.
6. No reserves requested.
7. ~ Proposed Order 11/08/17

RECOMMENDATION

Need to clear note 5, then Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **03/11/19**.

(cs)

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

DATE: 03/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700078

CASE NAME: MTR OF LYDIA S YRIGOYEN

HEARING: FIRST AND FINAL Account and Report of LEROY R YRIGOYEN and
Petition for allowance of fees filed.

COUNSEL:

LEROY R YRIGOYEN (PET)...PAUL HORN
LYDIA S YRIGOYEN (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON First and Final Account and Report; Petition for allowance of Fees, by executor/Petitioner, Leroy R. Yrigoyen

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

1. Final Inventory and Appraisal filed 08/07/17; however caption does not indicate if this is a final Inventory and attachment 2 does not indicate whether property is community or separate. JTD
2. Petitioner is the surviving spouse and elects to subject the decedent's separate property and decedent's interest in the community property that under the laws of intestate succession passes to the surviving spouse to this administration. However, an election must be filed within four months after the issuance of letter or within further time that the court may allow before entry of any order determining passing to surviving spouse. **Need** election per Pr.C. §13502.
3. Accounting period 12/17/15 – 11/30/17.
4. Assets on Hand \$69,012.45 cash
5. **Need** bank statement to support ending balance per local rule 20-908.
6. Schedule of Disbursement [LF, p. 17] indicates a disbursements of \$2,100 to Eduardo Salina and \$37.48 to MyNHD, Inc. **Need** verified supplement clarifying disbursements.
7. Schedule of Receipts lists interest for CA United Bank on various dates prior to decedent's date of death. Question if this account existed prior to date of death as it is not listed on inventory and appraisal. **Need** clarification.
8. **Need** copy of escrow statement per Local Rule 20-910.
9. Statutory fees in the amount of \$4,167.63 requested. Calculated.

10. Petitioner requests reimbursement of \$2,646.50. itemized [Acct. 11/13/17, LF p. 9].
JTD
11. Bond of \$135,000 is sufficient.
12. No reserves being requested.
13. No proposed order. Submit after hearing.

RECOMMENDATION

Need to clear notes 2 & 5-8 Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **03/11/19**.

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700369
CASE NAME: MTR OF DORIS ANN KIPP
HEARING: PETITION FOR FINAL DISTRIBUTION AND WAIVER OF Account and
Report of CHRISTOPHER C REDRICH and Petition for allowance of fees filed.

COUNSEL:

CHRISTOPHER C REDRICH (PET)...PRO/PER
DORIS ANN KIPP (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution and Waiver by
Personal Representative, Christopher Redrich ["Petitioner"-grandson].

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

1. All heirs waive accounting.
2. Assets on Hand \$156,214.49 cash
3. Inventory and Appraisal filed 06/09/17; however, section 4 is not completed. **JTD**
4. Need bank statement to support ending balance per Local Rule 20-908. **(Supp. 02/26/18 page 1 of Ally Bank for accounts ending 3912 and 3927 provided; however, amount is higher than amount in note 2 by \$65.05.) Does Court wish to deem as de minimis? JTD**
5. Reimbursement for veterinary services of \$175 for decedent's pet is being requested. Need further clarification via verified supplement. **(Supp. 02/26/18. Decedent left a dog that required immunizations, checkup and teeth cleaning prior to surrendering dog to an animal rescue.) JTD**
6. Petitioner waives compensation.
7. Petitioner requests reimbursement of costs advanced of \$4,841.31. Itemized [LF, pg.15].
8. Notice given.
9. Petitioner requests \$1,000 in reserves for closing expenses. **JTD**
10. Proposed Order: 02/26/18; assets on hand and reimbursement amount do not match petition, need statements re: notice per Pr.C. § 9202; debts paid; sole & separate property

RECOMMENDATION:

Need to clear notes 3-7, then Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **03/11/19 and vacate future accounting review.**

(cs/ww)

Future Hearing: 9/10/18: Accounting Review

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

DATE: 03/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700668

CASE NAME: CORNELIUS D DIXON JR
HEARING: Petition for LETTERS OF ADMINISTRATION WITH LIMITED IAEA

COUNSEL:

ROBERT DIXON (PET)...JOHN M CARMACK
CORNELIUS D DIXON JR (DEC)...

GENERAL INFORMATION

Continued from 10/03/17. Counsel ordered to republish as petition and publication do not match.

Continued from 12/05/17 at request of court. Counsel to republish clarifying limited authority or file an amended petition.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with *limited* authority under IAEA by Robert Dixon, son

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

1. All heirs waive bond. Estate value consists of \$113,000 in real property. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code, §8481(c).
2. Declination of Walterine Dixon (surviving spouse) filed 06/30/17 [Petition, LF p. 7].
3. Proof of publication indicates requests for limited powers but includes full IAEA powers language. Counsel ordered to republish as petition and publication do not match. **Supp. 01/26/18 indicates notice and proof of service is in compliance with the wording directed by Pr.C. §8100 which set forth the mandatory form of notice. JTD**
4. **Declaration of Attorney John Carmack filed 12/01/17 in support of Petition for Letter of Administration; authorization to administer under IAEA with limited authority.**
5. ~Proposed Form Order: 06/30/17

RECOMMENDATION:

Court's discretion re note 3 and bond. If approved, set Accounting/Status review for **05/13/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs/nb/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700913

CASE NAME: BARBARA J SCOTT

SEE ALSO 8

HEARING: re: PTN TO DETERMINE SUCC TO REAL PROPERTY

COUNSEL:

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

XREF: PROPS1700937 THOMAS SCOTT

GENERAL INFORMATION:

Continued from 01/16/18 Court determines this a related action to PROPS1700937 and orders matter be set to trail the next hearing in said case.

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Merrie Scott, daughter/Petitioner

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

1. Petitioner seeks 100% interest, in decedent's 50% interest; in real property per the will.
2. ~Proposed Form Order: 10/06/17

RECOMMENDATION

Court's discretion.

(ww/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700937

CASE NAME: THOMAS SCOTT

SEE ALSO 7

HEARING:

Petition to determine succession to Real Property

COUNSEL:

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

XREF: PROPS1700913 BARBARA J SCOTT

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

GENERAL INFORMATION:

Decedent passed away on 01/01/88.

Continued from 01/16/18 continued to be heard with matter PROPS1700913.

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

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

1. Petitioner requests a determination that decedent's 50% interest in real property located in San Bernardino County pass to petitioner without administration. Petitioner is decedent's issue and purported sole heir per intestate succession,
2. Copy of grant deed filed 01/12/18 [Supp. LFp.3].
3. ~Proposed Form Order 10/06/17.

RECOMMENDATION:

Court's Discretion.

(nb/cs)

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

DATE: 03/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701048

CASE NAME: DONALD LEROY SHEETZ

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

COUNSEL:

RICHARD SHEETZ (PET)...DENNIS M SANDOVAL
DONALD LEROY SHEETZ (DEC)...

GENERAL INFORMATION

Continued from 12/11/17 at request of Court to re publish with all decedent's names. Richard Sheets is appointed Special administrator with limited powers to secure, maintain, have property appraised and work with mortgage company.

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Richard Sheetz, brother/Petitioner

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

1. Will waives bond. Net estate value \$500,000 with \$5,000 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code, § 8481(b)).
2. Supplement filed 11/30/17 indicates decedent had a reverse mortgage and \$125,000 is due. A delay in the appointment of an executor could result in a foreclosure of the property by the reverse mortgage company. JTD
3. Correct version of petition filed 11/30/17 does not include decedent's aka's. Does court wish to require amended petition. JTD
4. **Need** proof of re publication with all decedent's names as instructed by court on 12/11/17.
5. ~Proposed Form Order: 10/19/17

RECOMMENDATION

Need to clear note 4, then Court's discretion re bond and notes 2 and 3. If approved, set Accounting/Status Review for **05/13/19**. Any accounting to be filed 30 days in advance local rule 20-901.

Note requirements of local rule 20-908

(cs)

Superior Court of Calif,
County of San Bernardino

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

DATE: 03/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800088

CASE NAME: ROLLAND EDWIN ODENBREIT

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

COUNSEL:

RICHARD E ODENBREIT (PET)...LAW OFFICES OF ANDREA GEE
ROLLAND EDWIN ODENBREIT (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full
Authority under IAEA by Richard Odenbreit, Executor/Petitioner

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

1. Will waives bond. Estate value \$1,325,000 with \$1,010,000 in personal property.
The court may for good cause require that a bond be given, either before or after
issuance of letters. (Prob. Code, § 8481(b)).
2. ~Proposed Form Order: 02/05/18.

RECOMMENDATION

RFA, Court's discretion re bond. If approved, set Accounting/Status Review for **05/13/19**.
Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of
local rule 20-908.

(cs)

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

DATE: 03/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800109

CASE NAME: MTR OF MARION THOMAS TONGATE

VACATED Rescheduled to 3/28/18

HEARING:

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

COUNSEL:

SHARON ABUGHAZALEH (PET)...MARK E CARRILLO
MARION THOMAS TONGATE (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Sharon Abughazaleh, Petitioner/daughter

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

1. Will waives bond. Net estate value \$561,000 with \$36,000 personal property. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code, § 8481(b)).
2. Will indicates an aka; however, petition does not include aka. Need verified supplement listing all of decedent's aka's.
3. Witnesses do not attest will was not signed under duress, and did not sign under penalty of perjury. Need Proof of Subscribing Witness (form DE-131).
4. Need Duties and Liabilities (form DE-147).
5. Need Notice to Petition to Administer Estate and proof of service.
6. Need proof of publication.
7. No proposed Form Order/Letters. Submit after hearing.

RECOMMENDATION

Need to clear notes 2-6, Court's discretion re bond If approved, set Accounting/Status Review for **05/13/19**. Any accounting to be filed 30 days in advance local rule 20-901.

Note requirements of local rule 20-908.

(cs)

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

DATE: 03/05/18 TIME: 8:30 DEPT: S37P

CASE#: SPR SS02287

CASE NAME: IN TEH ESTATE OF DEAN M DEVOE

SEE ALSO 21

HEARING:

Petition for INSTRUCTIONS TO ABANDON PROERTY AND TERMINATION
OF ADMINISTRATION OF ESTATE

COUNSEL:

DEAN M DEVOE	(DEC)...
MELODIE Z SCOTT	(SA)...HARTNELL LISTER & MOORE
MELODIE Z SCOTT	(PET)...RYAN J GALLANT
R WARREN JONES	(TP)...ROBERT K BOLT
KENT BERGSTROM	(A LEE ADAIR)
PACIFIC WESTERN BANK	(HEMAR, ROUSSO & HEALD, LLP)

GENERAL INFORMATION:

Continued from **08/15/17** at request of counsel to give notice. The Court requests further information on the "designated super fund site." What efforts have been made to sell the property? Have other owners been contacted for possible buy out? Counsel may file petition to deem property abandoned/no asset estate. The Court orders any fees due to Melodie Scott to be paid to Pacific Western Bank. Ms. Russo reports list of Melodie Scott's cases is incomplete.

Continued from **10/03/17** on courts motion.

Continued from 12/11/17 at request of court. Court needs value of property before being able to grant petition.

THIS CASE IS SET FOR HEARING ON Petition for Instructions to Abandon Property and Termination of Administration of Estate by Administrator, Melodie Z. Scott [Petitioner] Pr. C. §§9611,9780.

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

1. Petition indicates the real property remaining in the estate is located in Barstow, CA, and is an undivided 25% interest in a 6 acre parcel. Petitioner is unable to sell properties due to the toxic conditions on the site, made especially unattractive by its fractional interest. Petitioner alleges as the estate continues to hold this property, liability to the estate may result if any damages are caused by the "super fund"

conditions on said property. **Need declaration in response to Court's questions via verified supplement.**

2. Petitioner requests the Court approve and confirm the abandonment of the decedent's interest in real property, an undivided 25% interest in a 6 acre parcel in Barstow, CA; and terminating the administration of the estate.
3. ~Proposed Order 09/06/17.

RECOMMENDATION:

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

(nb/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 8:35 DEPT: S37P

CASE#: TRU PS1800027

CASE NAME: THE LOYND FAMILY TRUST

HEARING:

Petition for To Determine The Existence of A Trust and for
Instructions

COUNSEL:

RAMONA G LOYND (PET)...RICHARD G ANDERSON
THE LOYND FAMILY TRUST (TRU)...PRO/PER

Currently under review by Legal Research.

(LR)

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 03/05/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400238

CASE NAME: Randall Alton Gonzales

SEE ALSO 15

HEARING:

Petition for (PC SEC 850) TO RETURN MONIES DEPLETED FROM THE
CONSERVATEE'S ESTATE

COUNSEL:

TERI SUE GONZALES . (CPE)...

RANDALL ALTON GONZALES (CEP)...SHEASBY AND ASSOCIATES

TERI SUI MCKINNEY (RES)...

JP MORGAN CHASE BANK, N.A.

Waiver of Court Fees and Costs filed by TERI SUE GONZALES is GRANTED

Currently under review by Legal Research.

(LR)

(CS)

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

DATE: 03/05/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400238

CASE NAME: Randall Alton Gonzales

SEE ALSO 14

HEARING: Accounting Review

COUNSEL:

TERI SUE GONZALES . (CPE)...
RANDALL ALTON GONZALES (CEP)...SHEASBY AND ASSOCIATES
TERI SUI MCKINNEY (RES)...
JP MORGAN CHASE BANK, N.A.

GENERAL INFORMATION:

Continued from **04/04/16, 06/03/16 and 06/14/16**. Conservator's counsel is subbing out as an accounting has not yet been filed. Court ordered additional bond of \$10,500 for SNT. All funds in SNT to be frozen. Accounting re SNT to be filed by 07/22/16.

Continued from **08/22/16**. No appearance. **Matter referred to Public Guardian**. Citation issued to Teri Sue Gonzales

Continued from **09/26/16**. The Court orders Teri Gonzales suspended as conservator. The Court orders Diana Boley to be physically present at next hearing. The Court cites Teri Sue Gonzales to be present at next hearing. Notice by Judicial Assistant

Continued from **12/19/16**. Due to prior failure to appear and file accountings in this matter, Teri Sue Gonzales is hereby suspended as conservator of the person and estate of Randall Alton Gonzales. She is also suspended as the trustee of the special needs trust for Randall Alton Gonzales. Counsel, for conservator, objects to the suspension. Shashauna Szczechowicz will notify all banks of the suspension of Teri Sue Gonzales. Court appoints the public guardian as conservator of the estate only. It is further noted by the court that a bond is not required in this matter as there is already a bond in place for the Special Needs Trust. Citation issued as to Teri Sue Gonzales.

Continued from **03/27/17**. Counsel report all funds are missing. The \$75,000 from the blocked account and the \$45,000 from the interest bearing account. Counsel for the surety confirms that although the bond premium has not been paid the surety is still liable. Public guardian is to have their 850 petition filed by 7/17/17. TERI SUE GONZALES is cited to appear (this is the third time) at next hearing, should she not appear a bench warrant will issue. Citation issued to : Teri Sue Gonzalez.

Continued from **07/17/17**. Court questions the validity of the Order placing funds in blocked account. Once petition for surcharge is filed, the surety company will not object and pay the amount of the surcharge upon receipt of the order. The surety company is to

be given notice of any and all upcoming hearings. The Public Guardian filed an ex parte petition requesting appointment of Matthew Sheasby as Guardian Ad Litem. Court appoints Matthew Sheasby as Guardian Ad Litem for Randall Alton Gonzales. Continued from **10/02/17** at request of counsel. Notice to be given by Matthew Sheasby. Continued from **10/10/17** at request of counsel for JP Morgan to respond to law suit. Continued from **12/11/17** **Mr. Sheasby gives oral report to Court. He reports an 850 petition has been filed. He further reports a settlement has been reached with JP Morgan Chase and a petition for good faith settlement will filed. Matter continued for conservator to be served by publication. Mr. Moore reports his client has no objection to getting money from Chase, but does not want his sister to be penalized.**

THIS CASE SET FOR HEARING ON Accounting Review

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

1. Order Waiving First conservatorship account granted 06/09/15 for period ending 03/30/15.
2. SNT established on 05/29/15 \$50,000 bond, with additional \$10,500.
3. Need accounting for SNT.
4. Need Second Account/waiver for Conservatorship.
5. Notice of Non-Payment of Bond premium filed 03/14/17 and **02/22/18**.
6. Due Diligence filed 12/27/17 as to Teri Sue Gonzales.
7. Need notice to the Surety company.
8. Notice of Death of Attorney Diana C. Boley, former attorney for Conservator/Trustee, filed 10/27/16.
9. Suretec Insurance Company's Report of Subpoena to Chase Bank re SNT Account filed 03/22/17.

RECOMMENDATION:

Inquire status
(/lc/nb/lh/nb/cs)

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

DATE: 03/05/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600098

CASE NAME: MTR OF FORTMAN S YAN

HEARING:
Accounting Review

COUNSEL:
ROBBIN YAN-SINGZON (CPE)...BRYAN C HARTNELL
FORTMAN S YAN (CEP)...WALTER T. MOORE
FORTMAN S YAN (CPE)...BRYAN C HARTNELL

GENERAL INFORMATION
Continued from 09/05/17.

THIS CASE SET FOR HEARING ON Accounting Review.

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

1. Robbin Yan-Singzon, daughter, was appointed as Conservator of the person and estate on 06/28/16, bond \$47,000.
2. Partial No. 1 Inventory and Appraisal filed 11/13/17. Need final inventory and appraisal.
3. Need First accounting beginning with 06/28/16.

RECOMMENDATION

Inquire status.

(cs)

Future Hearing:
04/16/18 Compliance review hearing

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

DATE: 03/05/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600269

CASE NAME: PATRICIA MAE LAWRENCE PARK
HEARING: Motion Re: for reconsideration Filed by Petitioner PATRICIA MAE
LAWRENCE PARK

COUNSEL:

JANICE L PARK (CP)...PRO/PER
PATRICIA MAE LAWRENCE PARK (CTP)...JENNIFER M DANIEL

XREF: CIFMS1600004 JANICE PARK -V- JUDITH PARK
CIFDS1700108 PATRICIA MAE LAWRENCE PARK
CIFDS1700132 PARK VS. PARK

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Motion Re: for reconsideration filed by
Petitioner/proposed conservatee Patricia Mae Lawrence Park

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

1. Petitioner requests that the Court reconsider its order of January 29, 2018 wherein the court granted ex parte petition for the use of social security funds to pay the costs of transportation to the EC§730 interview and reserved jurisdiction on the issue of reimbursement of travel costs.
2. Petitioner alleges that she has not obstructed the ability to conduct an interview as she has been willing to meet Dr. Sawicky in the comfort of her own home.
3. The conservatee objects to the proposed conservatorship and objects to any of the conservatorship funds being used to pay for any part of a §730 evaluation.
4. Conservatee requests that the Court reconsider and vacate its prior ruling, order Janice to prepare and file an accounting, and authorize electronic service of the TRO and/or, in alternative, authorize a retainer fee to be paid by county voucher for the services of process on Janice Park.
5. Notice given.
6. No proposed order. Submit after hearing.

RECOMMENDATION:

Court's discretion.

(cs)

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

DATE: 03/05/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600279

CASE NAME: EPHRAIM HOLLAND

HEARING: First and Final Account and Report of MARK B HOLLAND and
Petition for allowance of fees filed.

COUNSEL:

MARK B HOLLAND (CPE)...REIKO J HICKS
EPHRAIM HOLLAND (CEP)...PRO/PER

GENERAL INFORMATION:

Continued from 12/11/17 continued at request of Court to clear probate notes.

THIS CASE IS SET FOR HEARING ON First and Final Report of Temporary
Conservator and Petition for settlement by Mark Holland, son/Petitioner

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

1. Mark Holland, Petitioner was appointed temporary conservator on 10/17/16. Temporary Letters issued 10/17/16 and Order granted on 10/17/16. Petitioner never got appointment general conservator as Conservatee passed away on 10/20/16. At the general hearing, the Court ordered Decedent's accounts remain frozen pending further order of Court and an accounting/waiver of accounting be filed.
2. Petitioner alleges that general letters never issued, and an Inventory and Appraisal was not completed. Petitioner provides accounting period: 10/11/16 to 10/20/16 (9 days). However, question if any assets marshaled to require an accounting for this period. **Need** verified supplement.
3. **If** assets were marshaled, **need** an accounting for the period that ended on the date of death and separate accounting for the period subsequent to the date of death. Pr.C. §2620(b).
4. **Need** Notice of Conservatee's death. Pr.C. 2361.
5. **Need** Notice to GAL, Mitchell Roth.
6. Petitioner is sole heir and waives compensation and accounting.
7. Attorney is not seeking compensation.
8. No proposed Order. Submit after hearing.

RECOMMENDATION:

Need to clear notes 2-5, then Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge for 03/11/19.

(cs)

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

DATE: 03/05/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700008

CASE NAME: ANDREW ABDI MLAMBA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of DANIEL KAMBALE MLAMBA

COUNSEL:

DANIEL KAMBALE MLAMBA	(PET)...PRO/PER
HADIJA ABDI MLAMBA	(PET)...PRO/PER
ANDREW ABDI MLAMBA	(CEE)...LENITA SKORETZ

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Daniel Mlamba and Hadija Mlamba, (mother and father) appointed conservators of the person on 07/31/17.
2. **Need** Notification of Conservatee's rights per Pr.C.§1830(c).
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION

Need to clear notes 2-4. Inquire Status

(cs)

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

DATE: 03/05/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800019

CASE NAME: Jimmy Lee Hubbling

HEARING: Petition for Appointment of Conservator

COUNSEL:

EMILY MARIE HUBBLING (CPE)...DUANE P BOOTH
JIMMY LEE HUBBLING (CEP)...

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Emily Hubbling, petitioner/ spouse

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

1. Petitioner requests to waive bond as all property is owned as joint community property between petitioner and proposed conservatee. JTD
2. Petitioner seeks medical powers. Capacity Declaration filed 02/14/18.
3. Petitioner only requests medical powers; however, Capacity Declaration contains dementia powers attachment. If dementia powers sought, need appointment of counsel. Court to clarify.
4. Return of Citation with proof of service filed 02/14/18.
5. **Need** Confidential Screening form.
6. **Need** Certificate of Completion of the Conservatorship Training Class.
7. **Need** Court Investigator report.
8. ~Proposed Form Order: 01/31/18.

RECOMMENDATION

Need to clear notes 5-7-. If approved, set hearing for Compliance Review for 09/25/18 for the filing of the required documents and hearing re Accounting Review for 05/13/19. Any accounting to be filed 30 days in advance.

(cs)

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

DATE: 03/05/18 TIME: 9:30 DEPT: S37P

CASE#: SPR SS02287

CASE NAME: IN TEH ESTATE OF DEAN M DEVOE

SEE ALSO 12

HEARING:

Accounting Review

COUNSEL:

DEAN M DEVOE	(DEC)...
MELODIE Z SCOTT	(SA)...HARTNELL LISTER & MOORE
MELODIE Z SCOTT	(PET)...RYAN J GALLANT
R WARREN JONES	(TP)...ROBERT K BOLT
KENT BERGSTROM	(A LEE ADAIR)
PACIFIC WESTERN BANK	(HEMAR, ROUSSO & HEALD, LLP)

GENERAL INFORMATION:

Continued from **06/26/17**. Counsel to file a list of all cases, names and case numbers on which Melodie Scott is involved by 07/14/17. Third party creditor is to be given notice on all cases involving Ms. Scott.

Continued from **10/03/17** on courts motion.

Continued from 12/05/17 to clear probate notes

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Matter set at 12/06/16 status report hearing. Need Order after Hearing.
2. No accounting or status report of administration. Need same.
3. Need list of all cases, names, and case numbers.

RECOMMENDATION:

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

(nb/lh/nb/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/05/18 TIME: 1:30 DEPT: S37P

CASE#: PRO PS0800088

CASE NAME: MTR OF JUANITA DAVIS SLOAN

HEARING:

Court Trial set for PETITION FOR PROBATE of MARIBELLE D MCDOUGLE

COUNSEL:

HSBC BANK	PET)...LAUREL I HANDLEY, GENAIL M AND
JUANITA DAVIS SLOAN	(DEC)...
MARIBELLE D MCDOUGLE	(PET)...ROBERT L KERN
WELLS FARGO BANK	PET)...LAUREL I HANDLEY, GENAIL M AND

No notes – Trial JTD.