



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 03/08/18

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.

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: 03/08/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1300441

CASE NAME: THE SPECIAL NEEDS TRUST OF DANIEL E. CHARBONNEAU

HEARING:

Accounting Review

COUNSEL:

INLAND COUNTIES REGIONAL CENTE (TEE)...STEVEN K BECKETT
INLAND COUNTIES REGIONALCENTER (PET)...STEVEN K BECKETT
J DAVID HORSPOOL (DAVID E FOATE
THE SPECIAL NEEDS TRUST OF DAN (TRU)...J. DAVID HORSPOOL

GENERAL INFORMATION

Continued from 01/18/18. Telephonic continuance requested.

THIS CASE IS SET FOR HEARING ON Accounting Review.

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

1. Waiver of Trust Master Accounting for IRC approved 12/15/16
2. **Need** next accounting or waiver.

RECOMMENDATION

Inquire status of accounting.

(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: 03/08/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400722

CASE NAME: Paul John Scott

SEE ALSO 3, 4

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$500.00 EACH

COUNSEL:

KATHERINE SCOTT	(PET)...LAW OFFICES OF FREDDIE VVEGA
KIMBERLY ANN CHARTIER	(PET)...BROWN WHITE & NEWHOUSE LLP
PAUL JOHN SCOTT	(DEC)...

GENERAL INFORMATION

OSC set on 02/08/18 for failure to file. Sanctions set for counsel and administrator of \$500 each. Counsel and administrator to appear.

THIS CASE SET FOR HEARING ON **OSC re Sanctions \$500 each**/Accounting review/Status.

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

1. Letters of Administration issued to Katherine Scott, spouse, on 11/05/14; full authority, \$100,000 bond.
2. Final Inventory and Appraisal filed 09/09/16.
3. Previous status report approved on 05/18/17.
4. **Note:** Notice of non-payment of probate referee fees of \$76 filed by Burdette Garvin on 02/09/18.
5. **Need** accounting or further status report.

RECOMMENDATION

Court's discretion re OSC. Inquire status of accounting and referee fees. Court to notice bonding company.

(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: 03/08/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400722

CASE NAME: Paul John Scott

SEE ALSO 2, 4

HEARING:

Hearing Re: OSC RE SURCHARGE OF \$500.00 ON ADMINISTRATOR

COUNSEL:

KATHERINE SCOTT	(PET)...LAW OFFICES OF FREDDIE VVEGA
KIMBERLY ANN CHARTIER	(PET)...BROWN WHITE & NEWHOUSE LLP
PAUL JOHN SCOTT	(DEC)...

See notes on matter 2.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/08/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400722

CASE NAME: Paul John Scott

SEE ALSO 2, 3

HEARING:

Accounting Review

COUNSEL:

KATHERINE SCOTT

KIMBERLY ANN CHARTIER

PAUL JOHN SCOTT

(PET)...LAW OFFICES OF FREDDIE VVEGA

(PET)...BROWN WHITE & NEWHOUSE LLP

(DEC)...

See notes on matter 2.

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

DATE: 03/08/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500091

CASE NAME: Moises Chinchilla

HEARING:
Hearing re Final Discharge

COUNSEL:

CHRISTINA CHINCHILLA (PET)...JANIS B MARTINDALE
CRISTINA CHINCHILLA (PET)...JANIS B. MARTINDALE
MOISES CHINCHILLA (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final Distribution for Cristina Chinchilla, daughter/sole heir, approved on 03/02/17; order signed 03/28/17.
2. Personal representative is sole heir, no receipt required.
3. **Need** Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b).

RECOMMENDATION

Inquire status of discharge order.

(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: 03/08/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500572

CASE NAME: MARY TERESA TRENARY

HEARING:

Hearing re Final Discharge

COUNSEL:

KIMBERLY A. COLLINS (PET)...REIKO H HICKS
MARY TERESA TRENARY (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final Distribution for Kimberly Collins, daughter, approved on 03/02/17; order signed 03/28/17.
2. **Need** receipts for Kathy Castillo, Van and Teresa Collins.
3. **Need** Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b).

RECOMMENDATION

Inquire status of receipts and discharge order.

(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: 03/08/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600192

CASE NAME: CHRISTOPHER DENNIS LAWSON

HEARING:
Accounting Review

COUNSEL:
CHRISTOPHER DANIEL LAWSON (DEC)...
JESSE JAMES LAWSON (PET)... DAVID PHILIPSON

GENERAL INFORMATION

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 Jesse Lawson, brother, on 08/30/16; full authority, no bond.
2. Final Inventory and Appraisal filed 02/27/17.
3. Previous status report approved on 09/14/17.
4. **Need** accounting or status report.

RECOMMENDATION

Inquire status of accounting.
(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: 03/08/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600522

CASE NAME: MTR OF LUCY R TAYLOR

HEARING:

FIRST AND FINAL Account and Report of BERNARD TAYLOR JR and
Petition for allowance of fees filed.

COUNSEL:

BERNARD TAYLOR JR (PET)...WILFRID C LEMANN
LUCY ROMERO TAYLOR (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for
Allowance of Fees by Bernard Taylor Jr, son.

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

1. Assets on hand \$270,900.01 in cash.
2. Administrator and Attorney seek statutory fees of \$9,404.79 each. Ok.
3. Attorney seeks extraordinary fees of \$4,557.50 for 23.65 hours at \$110/350 per hour for paralegal and attorney services. [Acct. 12/0417 LFpg225-29].
4. Administrator seeks a reserve of \$2,500.
5. ~Proposed Order: 12/04/17.

RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **03/14/19**.

(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: 03/08/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600801
CASE NAME: MTR OF HERSEL RAY PIERCE, SR
HEARING: Report Sale and Petition for Order Confirming Sale of Real Property.

COUNSEL:

DESIREE D SMITH	(PET)...CHARLENE L USHER
DESIREE SMITH	(PET)...CHRISTINA FERRANTE
HERSEL RAY PIERCE JR	(PET)...USHER LAW GROUP, PC
HERSEL RAY PIERCE SR.	(DEC)...
SEBREN A PIERCE	(OBJ)...PRO/PER

Address	1485 Western Ave. San Bernardino 92411 APN 1077-361-35-0000
Appraised value	\$177,000.00 reappraisal for sale.
Sale price	\$175,000.00
First overbid	\$184,250.00
Deposit	\$8,750, insufficient. Deposit of 10% of \$17,500 is required absent special circumstances per local rule 20-807(a).
Commission	6% [\$10,500] total commission to Sentinel Realty Partners
Additional bond	Petitioners seek funds be placed into blocked account.
Reason for sale	Debts and best interest of the interested persons.
Exposure to market	MLS, marketing and advertising.
Notice	Ok.

(lc)

Future Hearing: 07/05/18 *Accounting Review.*

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

DATE: 03/08/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600883

CASE NAME: ESTATE OF GUADALUPE PACHECO BUENO

HEARING:

First & Final Account and Report of SOCORRO PANTOJA and Petition
for allowance of fees filed.

COUNSEL:

DEPARTMENT OF HEALTH CARE SERV (TP)...
GUADALUPE PACHECO BUENO (DEC)...
SOCORRO PANTOJA (PET)...RONALD W ASK
SURETEC INSURANCE COMPANY (PET)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for
Allowance of Fees by Socorro Pantoja, daughter.

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

1. Assets on hand \$123,904.22.
2. Administrator and counsel seek statutory fees of \$5,080 each. Ok.
3. Administrator seeks reimbursement of costs totaling \$13,606.19 [11/21 LFpg21-23].
4. Administrator seeks to pay Department of Healthcare Services reduced claim of \$48,993.81.
5. No proposed order. Submit after hearing.

RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **03/14/19**.

(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: 03/08/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601031

CASE NAME: THE JORDAAN CLARKE SPECIAL NEEDS TRUST

HEARING:

Hearing Re: STATUS OF NEW FILING RE PTN TO SELL TRUST PROP

COUNSEL:

RICHARD HUNTINGTON (PET)...MUSCARELLA & ASSOCIATES
THE JORDAAN CLARKE SPECIAL NEEDS TRUST (TRU)...
WELLS FARGO BANK (PET)...MUSCARELLA & ASSOCIATES

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status of File Petition to Sell Trust Property.

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

1. Matter set on 01/18/18 when Petition for Authority to Sell Trust Property by Richard Huntington was rejected and denied. New petition to be filed by 02/19/18. Any petition filed after will not be considered.
2. Petition for Authority to Sell Trust's Real property Subject to Report of Sale etc. appears to be filed; hearing set for 04/19/18. Court to clarify if proper petition is filed.

RECOMMENDATION

Court's discretion.

(lc)

Future Hearing:04/19/18 Petition for Authority to Sell Trust Real property subject to Report of Sale by Richard Huntington.

06/05/18 Final Discharge **Wells Fargo Bank**

06/05/18 Accounting Review **Richard Huntington, Successor Trustee**

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

DATE: 03/08/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601223

CASE NAME: MTR OF MICHAEL YOUNG AN

HEARING:
Accounting Review

COUNSEL:

MICHAEL YOUNG AN (DEC)..
THOMAS R HUNT,CORPORATE COUNSE (PET)...SHEPPARD MULLIN

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of **special administration** issued to City of Marion Indiana on 12/15/16; special powers, no bond. General petition does not appear to have been granted. Court may wish to set matter on calendar for proper publication, IAEA powers etc.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting or status report.

RECOMMENDATION

Need to clear notes 2-3 and court may wish to set matter in **30** days for general petition that was previously vacated on 02/09/17.

(lc)

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

DATE: 03/08/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700051

CASE NAME: BETTY JOYCE MANN

HEARING:

First and Final Account and Report of BEVERLY J CAUDILL and
Petition for allowance of fees filed.

COUNSEL:

BETTY JOYCE MANN (DEC)...
BEVERLY J CAUDILL (PET)...ALBREKTSON & SHUMATE, LLP

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Betty Mann, sister.

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

1. Assets on hand \$185,874.74 real and personal property.
2. Sole heir Jeffrey Mann waives accounting.
3. Administrator and counsel seek statutory fees of \$6,576.14 each.
4. Administrator seeks authorization to reimburse counsel \$465 for filing fee.
5. Administrator seeks a reserve of \$2,000.
6. ~Proposed Order: 11/20/17

RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **03/14/19**.

(lc)

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

DATE: 03/08/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700803

CASE NAME: JENNIFER J. STONE

HEARING:

Petition for LETTES OF ADMINISTRATION WITH FULL IAEA

COUNSEL:

JENNIFER J STONE (DEC)...
NANCY E KELLOGG (PET)...WALTER T. MOORE

GENERAL INFORMATION

Letters of Special Administration issued to Nancy Kellogg on 08/10/17.

Continued from 11/09/17. Counsel requested BOA branch manager to appear.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with **no** authority under IAEA by Nancy Kellogg, nominee.

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

1. Petitioner was nominated by decedent's two children.
2. Petitioner does not seek appear to seek any IAEA powers.
3. All heirs waive bond. However, **need** bond waiver on mandatory judicial council form DE-142/DE-111(a-3d). Net estate value is unknown.
4. Petitioner is not named in section 8. Therefore, it is unclear if petitioner is related. **Need** verified supplement.
5. **Need** proof of publication.
6. **Need** Notice to Petition to Administer Estate and proof of service.
7. ~Proposed Form Order: 08/09/17.

RECOMMENDATION

Need to clear notes 3-6. If approved, set Accounting/Status Review for **05/16/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(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: 03/08/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1701063

CASE NAME: ROBERT G. RIVERA AKA ROBERT GARCIA RIVERA

SEE ALSO 16, 17,17A

HEARING:

Petition for Probate Letters of Special Administration

COUNSEL:

ANGELA VARGAS

(OBJ)...ROBERT L KERN

ANGELA VARGAS

(PET)...ROBERT L KERN

ROBERT G. RIVERA

(DEC)...

ROBERT RIVERA JR.

(PET)...HANNAH SARGENT

Special administration – No notes – JTD

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/08/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1701063

CASE NAME: ROBERT G. RIVERA AKA ROBERT GARCIA RIVERA

SEE ALSO 15, 17,17A

HEARING:

Petition for Letters of Special Administration Filed by Robert
Rivera, Jr.

COUNSEL:

ANGELA VARGAS

(OBJ)...ROBERT L KERN

ANGELA VARGAS

(PET)...ROBERT L KERN

ROBERT G. RIVERA

(DEC)...

ROBERT RIVERA JR.

(PET)...HANNAH SARGENT

Special administration – No notes – JTD

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

DATE: 03/08/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1701063

CASE NAME: ROBERT G. RIVERA AKA ROBERT GARCIA RIVERA

SEE ALSO 15, 16, 17A

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

COUNSEL:

ANGELA VARGAS	(OBJ)...ROBERT L KERN
ANGELA VARGAS	(PET)...ROBERT L KERN
ROBERT G. RIVERA	(DEC)...
ROBERT RIVERA JR.	(PET)...HANNAH SARGENT

GENERAL INFORMATION:

Ex parte orders to shorten time denied on 01/12/18.

Continued from 01/18/18 exparte to 03/08/18. Hannah Sargent to file Amended Petition for Letters of Special Administration by 02/01/18 at 4PM to be set for 03/08/18. Court notes that petition set for 02/07/18 and 02/22/18 are to be continued to date of 03/08/18.

THIS CASE IS SET FOR HEARING ON

- Petition 1 - Petition for Probate, Letters Testamentary with Full Authority under IAEA by **Robert Rivera, Jr.**, son/executor.
- Petition 2 - Petition for Letters of Administration with **Limited** authority under IAEA by **Angela Vargas**, daughter

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

Petitioner 1 Robert Rivera Jr. Son

1. Will waives bond. Estimated net value of estate is \$483,968, consisting of real property and \$20,700 in annual income from real property. The court may for good cause require that a bond be given, either before or after issuance of letters (Prob. Code, § 8481(b)). **JTD**
2. **Need** due diligence as to remaining Robert Rivera Jr whose address is unknown.
3. **Opposition to Petition for Probate of Holographic Will filed 01/11/18 by Angela Vargas, daughter.** Objector alleges decedent fathered multiple children named "Robert Rivera, Jr," one of whose address and whereabouts are unknown.
4. **Answer filed by Robert Rivera, Jr on 03/01/18.**
5. ~Proposed form Order: 10/24/17

Petitioner 2 – Angela Vargas, daughter.

- 6 Petitioner seeks appointment; however, alternatively appoint Kirk Hoffman PPF; consent attached.
- 7 Petitioner seeks bond of \$20,000. Net estate value is \$270,000 in real property. Appears adequate based on limited authority and no personal property at this time.
- 8 **Need** due diligence as to remaining Robert Rivera Jr whose address is unknown.
- 9 **Need** proof of publication.
- 10 **Need** Duties form.
- 11 Three of decedent's children are all named Robert Rivera Jr.
- 12 No proposed order submitted.

RECOMMENDATION:

Matter is contested. Need to clear notes 2, 8-10; Court's discretion re bond. Petitioner 1 has higher priority if will is admitted. If approved, set future hearing for Accounting/Status Review on **05/16/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh/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: 03/08/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1701063

SEE ALSO 15, 16, 17

HEARING:

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

COUNSEL:

ANGELA VARGAS

(OBJ)...ROBERT L KERN

ANGELA VARGAS

(PET)...ROBERT L KERN

ROBERT G. RIVERA

(DEC)...

ROBERT RIVERA JR.

(PET)...HANNAH SARGENT

See notes on matter 17.

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

DATE: 03/08/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1701263

CASE NAME: ESTATE OF ALISON JANE CALDOW

HEARING:

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

COUNSEL:

ALISON JANE CALDOW (DEC)...
ANN VAN GILS (PET)...USHER LAW GROUP, PC

GENERAL INFORMATION

Continued from 01/18/18. Courtney Writer indicated that her firm was recently retained and that an objection would be filed. Court cleared publication.

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA Ann Van Gils, friend.

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

1. Will waives bond. Net estate value is \$223,000. Proposed executor is resident of UK. Court for good cause could require bond per Pr.C. § 8571.
2. Will mentions ASPCA; however, not in section 8 of petition [notice sufficient]. **Need** verified supplement.
3. ~Proposed form order: 12/18/17.

RECOMMENDATION

Need to clear note 2. If approved, set Accounting/Status Review for **05/16/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(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: 03/08/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800082

CASE NAME: MITSUKO PETROPULOS

HEARING:

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

COUNSEL:

MITSUKO PETROPULOS (DEC)...
SUSAN PETROPULOS (PET)...M. BRIAN CULLEN

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA Susan Petropulos, daughter

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

1. Will waives bond. Net estate value is \$230,000 in real property. However, petitioner is an Arizona resident and court has discretion to require bond per Pr.C. §8571.
JTD
2. **Need** Notice to Petition to Administer Estate and proof of service.
3. **Need** proof of publication
4. ~Proposed Form Order: 01/26/18.

RECOMMENDATION

Need to clear notes 2-3, Court's discretion re bond. If approved, set Accounting/Status Review for **05/16/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(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: 03/08/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800083

CASE NAME: MARY ELLA WOOD FARRIS AKA MARY E. FARRIS ET AL

HEARING:

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

COUNSEL:

BENJAMIN D. FARRIS (PET)...MARK H MCGUIRE
MARY ELLA WOOD FARRIS (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Benjamin Farris, son/Trustee.

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

1. Will waives bond. Net estate value is unknown. Court for good cause could require bond per Pr.C. § 8481(b).
2. The will conditionally incorporates decedent's Trust. Copy of Trust filed 01/26/18.
3. Notice filed; however, **Need** Notice to Petition to Administer Estate and proof of service or due diligence declarations for children Steven, Timothy and Sharyl Farris.
4. ~Proposed Form Order: 01/26/18.

RECOMMENDATION

Need to clear note 3, Court's discretion re bond. If approved, set Accounting/Status Review for **05/16/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 03/08/18 TIME: 8:35 DEPT: S35P

CASE#: TRU PS1800023

CASE NAME: Ava Shinedling 2017 Statutory Minor's Trust

HEARING:

Petition for 1)bring statutory minors trust under court supervision and 2)for court auth to invest

COUNSEL:

AARON SHINEDLING

(PET)...RODNUSKY & ASSOCIATES

AVA SHINEDLING 2017 STATUTORY

(TRU)...

Currently under review by legal research.

(LR)

Notice filed 02/020/18.

(lc)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIPS**

DATE: 03/08/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700401

CASE NAME: MTR OF BRIANNA F GOODE

HEARING:

Petition for Appointment of Conservator

COUNSEL:

GABRIELLA V MARTINEZ (GP)...PRO/PER
BRIANNA F GOODE (MIN)...

GENERAL INFORMATION

Gabriella Martinez, mother, appointed temporary Conservator of person on 11/09/17.

Continued from 01/04/18.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Gabriella Martinez, mother.

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

1. Petitioner seeks powers per Pr.C. § 2356 as to conservatee shall not be forced to be placed into mental health facility, experimental drugs etc. JTD
2. Petition does not state proposed conservatee is developmentally disabled; however, court may wish to clarify and determine if Counsel should be appointed.
3. Citation returned served.
4. Petitioner seeks medical powers. Capacity Declaration filed 12/22/17.
5. Certificate of Completion of the Conservatorship Training Class filed 02/06/18.
6. Request to excuse notice filed as to
 - a. Father, Hugh Goode Jr
 - b. Paternal grandparents Olga Oliver and Hugh Goode.
7. Court Investigator report filed 12/11/17.
8. ~Proposed Form Order: 11/01/17.

RECOMMENDATION

Court's discretion. If approved, set hearing for Compliance Review for **10/11/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lc)

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

DATE: 03/08/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700433
CASE NAME: MTR OF HUGO A. UGARTE
HEARING: Petition for Appointment of Conservator

COUNSEL:

HUGO A UGARTE (CTP)...E JOAN NELMS
MARIO UGARTE (CP)...PRO/PER
SILVANA SOLIS (CP)...PRO/PER

GENERAL INFORMATION

Continued from 01/11/18. *Interpreter*. Court accepted oral testimony for conservatorship class. Joan Nelms appointed counsel. Conservatee appeared.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Silvana Solis and Mario Ugarte, parents.

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

1. Petitioners seek powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
2. Petitioners seek civil rights not be limited without court order. JTD
3. Petitioners seek medical powers. Capacity Declaration filed 11/29/17.
4. Proposed conservatee is developmentally disabled. IRC report filed 1/08/18.
5. Proposed conservatee is developmentally disabled. **Need** report of Counsel Nelms.
6. Section 11 of petition is missing sibling Brigitte. **Need** verified supplement.
7. **Need updated** list of required contacts (Local form SB-12224) to include sibling Carolina.
8. **Need** notice of hearing and proof of service to sibling Brigitte.
9. Request to excuse notice filed as to the following; however, **forms not dated**.
 - a. Siblings Carolina, Carla, Mario Ugarte,
 - b. Maternal grandmother Gregoria Rios
 - c. Paternal grandmother Guadalupe Ortiz
10. Completion of the Conservatorship Training Class cleared on record.
11. Court Investigator report filed 01/08/18.
12. ~Proposed Form Order: 11/29/17.

RECOMMENDATION

Need to clear notes 5-9. If approved, set hearing for Compliance Review for **10/11/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C. §1830(c); Level of Care and Care Plan per Pr.C. §2352.5.

(lc)

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

DATE: 03/08/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700441
CASE NAME: MTR OF SERGIO HERNANDEZ
HEARING: Petition for Appointment of Conservator

COUNSEL:

JOSE D HERNANDEZ (CP)...PRO/PER
SERGIO HERNANDEZ (CTP)...JENNIFER M DANIEL

GENERAL INFORMATION

Continued from 01/11/18. *Interpreter*. Jennifer Daniel appointed counsel.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Jose Hernandez, father.

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

1. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Citation returned served.
4. Petitioner seeks medical powers. Capacity Declaration filed 01/03/18; however, section 4 does not indicate date seen or if proposed conservatee is under continuing care. **Need** completed form.
5. Proposed conservatee is developmentally disabled. **Need** report of Counsel Daniel.
6. Proposed conservatee is developmentally disabled. **Need** IRC report. IRC requested a 45 day continuance on 12/19/17.
7. List of required contacts is missing Sergio Hernandez and Asencion Vazquez; who were noticed. **Need** same if second degree relatives.
8. Notice filed 12/15/17; however, proof of service does not indicate a copy of petition was filed per Pr.C. §1822 and **need** notice to mother Margarita Hernandez.
9. Certificate of completion of Conservatorship Training class filed 01/04/18.
10. Court Investigator report filed 01/02/18.
11. ~Proposed Form Order: 11/28/17.

RECOMMENDATION

Need to clear notes 4-8. If approved, set hearing for Compliance Review for **10/11/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C. §1830(c); Level of Care and Care Plan per Pr.C. §2352.5.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/08/18 TIME: 9:30 DEPT: S35P

CASE#: SC SS00581

CASE NAME: IN THE MATTER OF WILLIAM HOWARD HADLEY

HEARING:

Petition for Appointment of Conservator

COUNSEL:

GEORGE DEMARCO	(CE)...BRYAN C. HARTNELL
GEORGE DEMARCO	(CEP)...BRYAN C. HARTNELL
LAWRENCE DEMARCO	(CPE)...HARTNELL LAW GROUP
LAWRENCE DEMARCO	(CPE)...PRO/PER
LENITA A SKORETZ	(PET)...LENITA A SKORETZ
WILLIAM HOWARD HADLEY	(CEP)...

*See notes in J drive *

Future Hearing: 04/09/19 *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

MISC

DATE: 03/08/18 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1400251

CASE NAME: Rodney Rogers & Lacey Rogers Family Trust

SEE ALSO 27, 28

HEARING:

Hearing Re: PETITIONERS OBJECTION TO COURTS TENTATIVE RULING

COUNSEL:

GARY ROGERS

(PET)...BRIAN W. SMETHURST

LYNN GAETA

(PET)...CUMMINS & WHITE

LYNN GAETA

(PET)...JAMES R WAKEFIELD

RODNEY ROGERS AND LACEY ROGERS(TRU)...

GENERAL INFORMATION

Continued from 10/26/17. Court makes orders regarding the petitioner's objections to the court's tentative ruling. Court notes this is not a contested hearing.

Continued from 12/12/17. Order signed for production of bank records. Brian Smethurst and James Wakefield to appear at next hearing.

THIS CASE SET FOR HEARING ON Objection to Court's tentative Ruling.

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

1. Tentative ruling approved on 06/27/17.
2. Objections to tentative ruling filed by Lynn Gaeta on 07/11/17.

RECOMMENDATION

Court's discretion.

(lc/nb/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: 03/08/18 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1400251

CASE NAME: Rodney Rogers & Lacey Rogers Family Trust

SEE ALSO 26, 28

HEARING:

Hearing Re: ACCOUNTING BY GARY ROGERS

COUNSEL:

GARY ROGERS (PET)...BRIAN W. SMETHURST
LYNN GAETA (PET)...CUMMINS & WHITE
LYNN GAETA (PET)...JAMES R WAKEFIELD
RODNEY ROGERS AND LACEY ROGERS(TRU)...

GENERAL INFORMATION

Continued from 10/26/17. Court notes this is not a contested matter.

Continued from 12/12/17. Order signed for production of bank records. Brian Smethurst and James Wakefield to appear at next hearing.

THIS CASE SET FOR HEARING ON Accounting review for **Gary Rogers**.

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

1. Matter set at 06/27/17 tentative ruling and ordered an accounting to be filed by Gary Rogers, Trustor's son, by 09/26/17.
2. Objections to tentative ruling filed by Lynn Gaeta on 07/11/17.

RECOMMENDATION

Inquire status of accounting.

(lc/nb/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: 03/08/18 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1400251

CASE NAME: Rodney Rogers & Lacey Rogers Family Trust

SEE ALSO 26, 27

HEARING:

Hearing Re: ACCOUNTING BY LYNN GAETA

COUNSEL:

GARY ROGERS	(PET)...BRIAN W. SMETHURST
LYNN GAETA	(PET)...CUMMINS & WHITE
LYNN GAETA	(PET)...JAMES R WAKEFIELD
RODNEY ROGERS AND LACEY ROGERS(TRU)...	

GENERAL INFORMATION

Continued from 10/26/17. Court notes that this is not a contested matter not is it an evidentiary hearing.

Continued from 12/12/17. Order signed for production of bank records. Brian Smethurst and James Wakefield to appear at next hearing.

THIS CASE SET FOR HEARING ON Accounting review for **Lynn Gaeta**.

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

1. Matter set at 06/27/17 tentative ruling and ordered an accounting to be filed by Lynn Gaeta, Trustee, by 09/26/17.
2. Objections to tentative ruling filed by Lynn Gaeta on 07/11/17 (see other matters).

RECOMMENDATION

Inquire status of accounting.

(lc/nb/lc)

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: 03/08/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1401074

CASE NAME: DOROTHY C PARSONS

HEARING:

Hearing re Final Discharge

COUNSEL:

DAVID PARSONS

(PET)...MATTHEW E SHEASBY

DOROTHY C PARSONS

(DEC)...

TERRI L PARSONS

(PET)...MATTHEW E SHEASBY

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge re Terri Parsons.

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

1. Prior Administrator, Terri Parsons, passed away on 03/03/17. Final Distribution for Terri approved on 03/02/17.
2. David Parsons, son, is successor administrator. It is unclear if Terri had issue.
3. Receipt for Advance Inheritance filed; however, **need** supplement and receipts/Pr.C.§ 13100 affidavits re issue of Terri.
4. **Need** Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b).

RECOMMENDATION

Inquire status of receipts and discharge order.

(lc)

Future hearing dates: 10/17/18 final discharge David Parsons

Superior Court of Calif, County of San Bernardino

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

DATE: 03/08/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600846

CASE NAME: MTR OF RONALD LEE NELSON

HEARING:
Accounting Review

COUNSEL:
JEFFREY A NELSON (PET)...D M DAVIS
RONALD LEE NELSON (DEC)...

GENERAL INFORMATION
Continued from 12/14/17.

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Jeffrey Nelson, son, on 12/05/16; **limited** authority, no bond.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting or status report.

RECOMMENDATION
Need to clear notes 2-3.
(lc)

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

DATE: 03/08/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700874
CASE NAME: JOSEPH LUIS NAVARRO

SEE ALSO 4, 5

HEARING: Petition for Letters of Administration with Full IAEA (Competing Petition)

COUNSEL:

JOSEPH LUIS NAVARRO (DEC)...
LORENNAL NAVARRO (PET)...PRO/PER
MATTHEW LUIS NAVARRO (PET)...DAVID L. HUGHES

GENERAL INFORMATION

Continued from 12/04/17. Marianne and Lorena Navarro [daughters] object.
Continued from 01/30/17. Mediation set for 02/21/18. Set for Trial.

THIS CASE SET FOR HEARING ON

Petition - 1: Petition for Letters of Administration with Full Authority under IAEA by
Matthew Navarro, son

Petition - 2: Petition for Letters of Administration with Full Authority under IAEA by
Lorena Navarro, daughter.

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

Petition -1 by Mathew, son

1. Petitioner resides in Missouri and requests that bond be determined by the Court. The estate consists of \$80,000.00 in real property. See competition petition. JTD
2. **Objections by Lorena Navarro returned for corrections on 01/08/18.**
3. **Reply to objections by Matthew Navarro.**
4. No proposed order.

Petition - 2 by Lorena, daughter:

5. Petitioner requests bond of \$448,800. Insufficient. Suggest bond of \$529,000. JTD.
6. **Need** proof of publication.
7. ~Proposed Form Order 12/26/17.

RECOMMENDATION

Need to clear note 6, Court's discretion re bond. Petitioners have equal priority. If approved, set Accounting/Status Review **05/16/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/nb/lc)

Future Hearing:
03/20/18 *Court Trial*
03/20/18 *Petition for letters of administration etc.*

Superior Court of Calif, County of San Bernardino

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

DATE: 03/08/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700874

CASE NAME: JOSEPH LUIS NAVARRO

SEE ALSO 3, 5

HEARING:

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

COUNSEL:

JOSEPH LUIS NAVARRO	(DEC)...
LORENNNA L NAVARRO	(PET)...PRO/PER
MATTHEW LUIS NAVARRO	(PET)...DAVID L. HUGHES

See notes on matter 3.

Future Hearing:

03/20/18 *Court Trial*

03/20/18 *Petition for letters of administration etc.*

Superior Court of Calif, County of San Bernardino

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

DATE: 03/08/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700874

CASE NAME: JOSEPH LUIS NAVARRO

SEE ALSO 3, 4

HEARING:
Readiness Calendar

COUNSEL:

JOSEPH LUIS NAVARRO	(DEC)...
LORENNAL NAVARRO	(PET)...PRO/PER
MATTHEW LUIS NAVARRO	(PET)...DAVID L. HUGHES

Readiness – No notes – JTD *

Future Hearing:
03/20/18 *Court Trial*
03/20/18 *Petition for letters of administration etc.*

Superior Court of Calif, County of San Bernardino

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

DATE: 03/08/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800079

CASE NAME: LINDA L. COYLE AKA LINDA LOU COYLE AKA LINDA COYLE

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

COUNSEL:

LINDA L COYLE (DEC)...
RAY T COYLE (PET)...MARK J TUNDIS

***CCP170.6 filed as to Judge TARA REILLY, case reassigned to
Judge JAMES MICHAEL WELCH for all purposes.***

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate of Will Letters of Administration
WWA with full authority under IAEA by Ray Coyle, son/sole beneficiary.

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

1. Letter attached as holographic will. Does not name executor and appears to be a will as statement "Everything is yours to do with as you see fit". Does court wish to require any points and authorities to support admission of will? JTD
2. Petitioner is sole beneficiary waives bond. Net estate value is \$427,500 of which \$2,500 is personal property. JTD
3. Proof of holographic will filed 01/25/18.
4. Publication filed on 02/14/18; however, Ontario News Press does not appear to be an adjudicated newspaper of general circulation. List can be found on court website. **Need** publication with approved newspaper.
5. ~Proposed Form Order: 01/25/18.

RECOMMENDATION

Need to clear note 4, Court's discretion re bond. If approved, set Accounting/Status Review for **05/16/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/08/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800085

CASE NAME: JESSE V. MARTINEZ

HEARING:

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

COUNSEL:

JESSE V. MARTINEZ (DEC)...
WILMA D. MARTINEZ (PET)...STEPHEN P JANIS

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Wilma Martinez, spouse.

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

1. Petitioner seeks bond of \$300,000. Ok.
2. Section 8 does not indicate ages of son and grandchildren. **Need** verified supplement indicating ages and whether *both* grandchildren are issue of predeceased child and who that issue was.
3. **Need** Notice to Petition to Administer Estate and proof of service.
4. ~Proposed Form Order: 01/26/18.

RECOMMENDATION

Need to clear notes 2-3, \$300,000 bond. If approved, set Accounting/Status Review for **05/16/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/13/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800124

CASE NAME: CARMEN REVECA NIETO

HEARING:

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

COUNSEL:

ARTURO NIETO (PET)...WILLIAM J BRUNICK

CARMEN NIETO (PET)...WILLIAM J BRUNICK

CARMEN REVECA NIETO (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full
authority under IAEA by Arturo and Carmen Nieto, parents.

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

1. Petitioners are sole heirs and waive bond. Net estate value is \$4,448,335.
2. **Need** proof of publication.
3. It appears decedent may be prior conservatee in case **CONPS1200235**. Next
hearing 08/29/18 Accounting review S36. Court may wish to inquire and cross
reference cases.
4. ~Proposed Form Order: 02/07/18

RECOMMENDATION

Need to clear note 2, Court's discretion re bond. If approved, set Accounting/Status
Review for **05/16/19**. Any accounting to be filed 30 days in advance local rule 20-901.
Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSRVATORSHIPS**

DATE: 03/08/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700014

CASE NAME: TRINITY PRYOR

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of AMANDA PRYOR

COUNSEL:

AMANDA PRYOR

(PET)...PRO/PER

TRINITY PRYOR

(CEE)...WALTER T. MOORE

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Amanda Pryor, mother, appointed conservator of the person only on 10/05/17.
Need order and letters.
2. **Need** proof of service of a copy of the Order for Conservatorship with 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, local rule 20-1403.

RECOMMENDATION

Need to clear notes 1-4.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/08/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700106

CASE NAME: JUAN MERCADO GONZALEZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MA VIRGINIA MERCADO

COUNSEL:

JUAN MERCADO GONZALEZ (CEE)...JAMES B CHURCH
MA VIRGINIA MERCADO (PET)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Ma Virginia Mercado, daughter, appointed conservator of the person only on 08/03/17.
2. Notification of Conservatee's rights filed 09/19/17. However, **need** to complete mailed service to the 5 children previously served.
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5, local rule 20-1403.

RECOMMENDATION

Need to clear notes 2-4.

(lc)

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

DATE: 03/08/18 TIME: 9:30 DEPT: S36P

CASE#: SC SS02136

CASE NAME: MTR OF MICHAEL LYNN MC NABB

HEARING:
Accounting Review

COUNSEL:

JEFFREY C MCNABB	(CPE)...LESLIE BARNETT, ESQ.
JEFFREY C. MC NABB	(CPE)...JAY OBERHOLTZER
MARSHA M BUCK	(CPE)...LESLIE BARNETT, ESQ.
MARSHA M. BUCK	(CPE)...JAY OBERHOLTZER
MICHAEL LYNN MC NABB	(CEP)...MARK J. FLORY

GENERAL INFORMATION

Continued from **05/04/17, 07/06/17, 08/24/17, 10/19/17 and 12/07/17.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 8th Account of Jeffrey McNabb and Marsha Buck, siblings, approved on 08/04/16.
2. **Need** 9th Account beginning with 03/01/16.

RECOMMENDATION

Inquire status of accounting.

(lc/cs/lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

Readiness Calendar

DATE: 03/08/18 TIME: 8:29 DEPT: S37P

CASE#: GAR PS1600228

CASE NAME: ARIYAH M. MONTOYA & AUDRINAH A. MONTOYA

SEE ALSO 2, 2A

HEARING: Hearing Re: PETITION FOR GUARDIANSHIP

COUNSEL:

ARIYAH M. MONTOYA

(MIN)...

AUDRINAH A. MONTOYA

(MIN)...

NIKOLAUS P. IVANOFF

(PET)...HOLSTROM BLOCK & PARKE

RONALD J MONTOYA

(OBJ)...JOHN

GENERAL INFORMATION:

Continued from 7/12/16 for father to file objections. Matter referred to Court Investigator.

Continued from 09/21/16. Temporary orders granted of person.

Continued from **03/09/17, 06/01/17** and **08/31/17**. Counsel are not ready for trial.

Continued from **11/16/17**. Parties are requesting a MSC.

Continued from 11/27/17.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Guardian, person and estate, by Nikolaus Ivanoff, step-father, minors now Ariyah 12 & Audrinah 8.

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

1. Mother is deceased.
2. Petition requests no bond be required. However, estimated value of the property of the estate indicates "Unknown." Court to inquire.
3. Petition reflects related child custody case SDASS161509 and step-parent adoption case, no case number provided.
4. CI report filed 09/15/16.
5. **Objection filed 7/21/16 by father, Ronald Montoya.**
6. **Supplement and Response to Objections filed on 09/09/16 by petitioner.**
7. ~Proposed Form Order: 05/18/16.

RECOMMENDATION:

Matter is contested. If approved, set hearing for Inventory and Appraisal for **05/31/18** and hearing for Accounting Review on **05/16/19**. Any account to be filed 30 days before hearing. Note Local Rules.

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

Superior Court of Calif, County of San Bernardino

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

DATE: 03/08/18 TIME: 8:29 DEPT: S37P

CASE#: GAR PS1600228

CASE NAME: ARIYAH M. MONTOYA & AUDRINAH A. MONTOYA

SEE ALSO 1, 2A

HEARING:

Readiness Calendar

COUNSEL:

ARIYAH M. MONTOYA	(MIN)...
AUDRINAH A. MONTOYA	(MIN)...
NIKOLAUS P. IVANOFF	(PET)...HOLSTROM BLOCK & PARKE
RONALD J MONTOYA	(OBJ)...JOHN

Readiness – No notes – JTD *

Superior Court of Calif, County of San Bernardino

Page: 2A ADD ON

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

DATE: 03/08/18 TIME: 8:29 DEPT: S37P

CASE#: GAR PS1600228

CASE NAME: ARIYAH M. MONTOYA & AUDRINAH A. MONTOYA

SEE ALSO 1, 2

HEARING:

Motion Re: Appointment of a Psychological evaluator Filed by
Petitioner RONALD J MONTOYA

COUNSEL:

ARIYAH M. MONTOYA	(MIN)...
AUDRINAH A. MONTOYA	(MIN)...
NIKOLAUS P. IVANOFF	(PET)...HOLSTROM BLOCK & PARKE
RONALD J MONTOYA	(OBJ)...JOHN

No notes – JTD

(lc)

Superior Court of Calif, County of San Bernardino

Page: 3

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 03/08/18 TIME: 8:30 DEPT: S37P

CASE#: PRO DS1000277

Vacated

CASE NAME: MTR OF THE SPECIAL NEEDS TRUST OF LARRY FORD

HEARING:

Accounting Review

COUNSEL:

INLAND COUNTIES REGIONAL CENTE (PET)...BRUNICK MCELHANEY

INLAND COUNTIES REGIONAL CENTE (PET)...STEVEN K BECKETT

THE SPECIAL NEEDS TRUST OF LAR (TRU)...

(lc)

Future hearing dates: 04/23/18 7th Account IRC

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 03/08/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500797

CASE NAME: KASHANI A MOHSEN

HEARING:
Hearing re Final Discharge

COUNSEL:
KASHANI A MOHSEN (DEC)...
SHADI K WEINBERGER (PET)...ZEV S BROOKS

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final Distribution for Shadi Weinberger, daughter, approved on 03/02/17.
2. **Need** receipt for Neda Mousavizadegan.
3. Proof of blocked account for Roja Kashani, minor, filed 07/05/17.
4. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status of receipt and discharge order.

(lc)

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

DATE: 03/08/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600169

CASE NAME: BETTY LOUS SCHLAICH

HEARING:

Final Distribution on Waiver of Account and Report of LINDI K DAYTON and Petition for allowance of fees filed.

COUNSEL:

BETTY LOU SCHLAICH (DEC)...
LINDI K DAYTON (PET)...CHRISTOPHER A SHUMATE

CIVDS1601094 (City of San Bernardino V Schlaich)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees by Lindi Dayton, daughter.

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

1. Assets on hand \$118,037.87 in cash
2. Administrator is sole heir and waives accounting.
3. Counsel seeks statutory fees of \$6,602.60 reduced by agreement from \$7,580. Ok.
4. Counsel seek reimbursement of costs totaling \$1,833.13. [11/20LFpg5].
5. Administrator seeks to reimburse counsel \$465 for filing fee.
6. Counsel seeks extraordinary fees of \$9,867.50 for 51.2 hours at \$110/380 per hour for paralegal and attorney services in relation to ***CIVDS1601094*** matter [11/20LFpg29-48].
7. ~Proposed Order: 11/20/17.

RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **03/14/19**.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 5A ADD ON

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

DATE: 03/08/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600537

CASE NAME: MTR OF EUGENE L WILKINSON

HEARING:

Hearing Re: MOTION FOR ATTORNEY FEES

COUNSEL:

DEBORAH WILKINSON	(PET)...MORTENSEN & REINHEIMER, PC
EUGENE L WILKINSON	(DEC)...
JANET WILKINSON	(OBJ)...PETER M BOCHNEWICH
JANET WILKINSON	(PET)...PETER M BOCHNEWICH
LINDSEY NAYLOR	(PET)...PETER M BOCHNEWICH

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Motion for Attorney's Fees.

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

1. Matter set on 03/01/18 after review of points and authorities in support of attorney's fees and Objection to points and authorities was filed 02/13/18 and 02/16/18 respectively. Matter not referred to legal research.

RECOMMENDATION

Court's discretion.

(lc)

Future Hearing:

05/10/18 Readiness calendar

05/10/18 Petition for Lindsey Naylor to establish rights etc.

05/10/18 Petition for probate of will & for letters etc.

05/10/18 Hearing re: Petition for invalidity of specific etc.

05/10/18 Petition for order to compel beneficiary etc.

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

DATE: 03/08/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600938

CASE NAME: GLORIA YVONNE ELLIOTT

HEARING:

Motion Re: MOTION TO BE RELIEVED AS COUNSEL Filed by Petitioner
JONOVA KNICKERBOCKER

COUNSEL:

GLORIA YVONNE ELLIOTT	(DEC)...
JONOVA KNICKERBOCKER	(PET)...SHEASBY AND ASSOCIATES
LISA HOEFGEN	(PET)...ROBERT J SPITZ

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Motion to be relieved as Counsel by Matthew Sheasby.

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

1. Petitioner, Matthew Sheasby, seeks to be removed as counsel for Jonova Knickerbocker; objector. Petitioner alleges that a conflict has arisen and cannot be rectified.
2. **Need** proof of service of Notice of Hearing re compliance with Rules of Court, rule 3.1362(d), including service of Notice of Motion, Declaration and Proposed Order.
3. ~Proposed Form Order: 11/28/17.

RECOMMENDATION

Need to clear note 2.

(lc)

Future Hearing:

03/13/18 Petition for return of real property

03/13/18 Hearing re: Approval of proposed action re cal real prop

08/20/18 *Accounting Review*.

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

DATE: 03/08/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601049
CASE NAME: MTR OF VICKIE IRENE ATIYEH
HEARING: Petition for PROBATE OF WILL & FOR LTRS TESTAMENTARY W/ FULL
IAEA

COUNSEL:

AWANA IRENE RING (PET)...PRO/PER
VICKIE IRENE ATIYEH (DEC)...

GENERAL INFORMATION

Continued from 01/05/17 and 03/16/17.

OSC set on **06/01/17** when Awana Ring was not present. Marybeth Fry advised she may file a competing petition.

Continued from 07/27/17 to clear probate notes. Bond required \$50,000. OSC off calendar due to appearance made in court.

Continued from 10/12/17. Petitioner to attempt to locate persons named in will.

Continued from 12/14/17.

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Awana Ring, mother.

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

1. Petitioner states all beneficiaries waive bond. \$50,000 bond posted 10/12/17.
2. The following persons are named in the will, but not in petition: Joe Cihak, Mary Beth, Fry, Judy Nowlen, Lorene Loader, Rhonda Homes, Bonnie Peterson and Chuck Hershey. **Supp 07/21/17 petitioner alleges internet searches were conducted and no parties were located. Need updated status on parties.**
3. **Need** Notice to Petition to Administer Estate and proof of service to Advance Inheritance, LLC.
4. ~Proposed Form Order: 10/19/16.

RECOMMENDATION

Need to clear notes 2-3. If approved, set Accounting/Status Review for **05/16/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/cs/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/08/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601279

CASE NAME: Leebertha Alisa Rogers

SEE ALSO 9, 10

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

EVANS LOUIS ROGERS Jr (PET)...PRO/PER

LEEERTHA ALISA ROGERS (DEC)...

See notes on matter 9.

Superior Court of Calif, County of San Bernardino

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

DATE: 03/08/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601279

CASE NAME: Leebertha Alisa Rogers

SEE ALSO 8, 10

HEARING:

Order to Show Cause RE: DISMISSAL

COUNSEL:

EVANS LOUIS ROGERS Jr (PET)...PRO/PER

LEEERTHA ALISA ROGERS (DEC)...

GENERAL INFORMATION:

Continued from **03/09/17, 05/25/17 and 07/27/17.**

OSC set on 07/27/17 when there was no appearance.

Continued from **10/12/17. OSC off calendar. \$75,000 bond required.**

OSC reset on 12/14/17. Need publication and bond.

THIS CASE IS SET FOR HEARING ON **OSC re Dismissal** on Petition for Letters of Administration with full authority under IAEA by Evans Rogers, Jr, brother.

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

1. Quentin Rogers, son/sole heir, waives bond. Estimated net value of estate is \$103,799 in real property. \$75,000 bond required.
2. **Need** Proof of Publication.
3. ~Proposed form Order: 12/27/16.

RECOMMENDATION:

Court's discretion re OSC. Need to clear note 2, \$75,000 bond. If approved, set Accounting/Status Review for **05/16/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh/lc/cs/lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 03/08/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601279

CASE NAME: Leebertha Alisa Rogers

SEE ALSO 8, 9

HEARING:

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

COUNSEL:

EVANS LOUIS ROGERS Jr (PET)...PRO/PER

LEEERTHA ALISA ROGERS (DEC)...

See notes on matter 9.

Superior Court of Calif, County of San Bernardino

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

DATE: 03/08/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700108

CASE NAME: MTR OF MALCOLM E SILVERTHORN

HEARING:

First and Final Account and Report of VIRGINIA SILVERTHORN and
Petition for allowance of fees filed.

COUNSEL:

MALCOLM E SILVERTHORN (DEC)...
VIRGINIA SILVERTHORN (PET)...KRISTINE M BORGIA

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for
Allowance of Fees by Virginia Silverthorn, spouse/Trustee.

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

1. Assets on hand \$190,000 in real property.
2. Executor waives statutory compensation.
3. Counsel seeks statutory fees of \$6,700. Ok.
4. ~Proposed Order: 11/27/17.

RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **03/14/19**.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/08/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700358

CASE NAME: MTR OF RICHARD MICHAEL GLAUM

HEARING:

Petition for Determination of Entitlement to Estate Distribution

COUNSEL:

CANDACE GLAUM	(PET)...DARLING LAW OFFICES
NICOLE M ANDERSON	(PET)...PRO/PER
RICHARD MICHAEL GLAUM	(DEC)...
STATE OF CALIFORNIA FRANCHISE	(TP)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Determination of Entitlement to Estate Distribution Pr.C.§ 11700 by Nicole Anderson.

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

1. Petitioner, Nicole Anderson, alleges that she is granddaughter of decedent. Candace Glaum, daughter in law, is current administrator.
2. Petitioner provides copy of birth certificate indicating she appears to be issue of pre-deceased son Timothy Glaum. It appears administrator's accounting now includes Nicole in distribution. Hearing 04/10/18.
3. ~Proposed order 11/27/17.

RECOMMENDATION

RFA.

(lc)

Future Hearing: 04/10/18 Final Account and Distribution
04/17/18 Final Account and Distribution 09/05/18 *Accounting Review*.

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

DATE: 03/08/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700469
CASE NAME: MARIA E RAMIREZ REVOCABLE TRUST
HEARING: FIRST AND FINAL Account and Report of MARY FRANCES LOPEZ-TIANA and Petition for allowance of fees filed.

COUNSEL:

DOLORES RENTERIA	(PET)...NEIL J DE LEON
LORRAINE RENTERIA	(PET)...NEIL J DE LEON
MARIA E RAMIREZ REVOCABLE TRUS	(TRU)...
MARY FRANCES LOPEZ-TIANA	(PET)... JOHN R RAMOS
MARY FRANCES LOPEZ-TIANA	(STE)... JOHN R RAMOS

GENERAL INFORMATION

Continued from 12/14/17. Objections have been filed.

THIS CASE SET FOR HEARING ON Final Account of Trust Administration by Mary Lopez-Tiana, Successor Trustee.

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

1. Accounting period 07/05/16 – 10/15/17.
2. Assets on hand \$254,516.90 in cash.
3. Attorney Ramos was paid \$9,565.50 in fees and costs for 28 hours at \$450. A balance of \$2,730 due is also being requested. [Acct.10/18LFpg75-82]. Costs of \$170.50 appear to be overhead per local rule 20-909. JTD
4. Trustee seeks ratification of fees paid of \$2,000 for 23.25 hours. [Acct.10/18LFpg83-84]. Trust allows reasonable fees [Acct.10/18LFpg35]. .
5. Trustee reimbursed herself costs of \$33,114.40. [Acct.10/18LFpg12-14].
6. Trust does not require bond.
7. **Need** notice of hearing and proof of service to all 14 beneficiaries listed [LFpg5-6].
8. **Objections filed 12/11/17 by beneficiaries Dolores and Lorraine Renteria on 12/11/17 seeking \$33,114.40 surcharge for reimbursements and explanation of \$110,000 deficiency in sale price of real property.**
9. No proposed order. Submit after hearing.

RECOMMENDATION

Need notice; matter is contested. If approved and *if* trust is court supervised, set hearing on the filing of receipts for **03/14/19**.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/08/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700709

Vacated

CASE NAME: ADAM JESSE BOSCH

HEARING:
Hearing Re: RECEIPT OF BOND

COUNSEL:
ADAM JESSE BOSCH (DEC)...
MARIE GARCIA (PET)...MELINDA S. BELL

Bond filed and letters issued.

(lc)

Future Hearing:12/20/18 *Accounting Review.*

Superior Court of Calif, County of San Bernardino

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

DATE: 03/08/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700728

CASE NAME: MTR OF DOROTHY MAE ROBINSON-HOWARD

HEARING:

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

COUNSEL:

DOROTHY MAE ROBINSON-HOWARD (DEC)...
JOHNNIE R GREEN (PET)...PRO/PER

GENERAL INFORMATION

OSC set on 10/12/17 when there was no appearance.

Continued from 12/14/17. OSC taken off.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full
authority under IAEA by Johnnie Green, daughter

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

1. All heirs waive bond. Estate value consists of \$229,000 in personal property. Court for good cause could require bond per Pr.C. § 8481(b).
2. **Need** proof of publication.
3. ~Proposed Form Order: 07/21/17

RECOMMENDATION

Need to clear note 2. Court's discretion re bond. If approved, set Accounting/Status Review for **05/16/19**. Any accounting to be filed 30 days in advance local rule 20-901.

Note requirements of local rule 20-908.

(cs/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/08/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701077

CASE NAME: Witherell Living Trust

HEARING:

Petition for to invalidate transfer of funds and designations of
death beneficiary due to undue influence etc

COUNSEL:

LINDA SCHAEFER (PET)...BEST BEST & KRIEGER
WITHERELL LIVING TRUST (TRU)...

Currently under review by legal research.

Continued matter. Notice not re-reviewed.

(lc)

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

DATE: 03/08/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800078

CASE NAME: MILTON JAMES YORBA AKA MILTON J. YORBA

HEARING:

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

COUNSEL:

ANDREA L. YORBA	(PET)...GAUDY LAW, INC
LEAH K. YORBA	(PET)...GAUDY LAW, INC
MILTON JAMES YORBA	(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Leah and Andrea Yorba, daughters.

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

1. All heirs waive bond. Net estate value is \$167,767.91 in personal property. Court for good cause could require bond per Pr.C. § 8481(b).
2. ~Proposed Form Order: 01/25/18

RECOMMENDATION

RFA subject to Court's discretion re bond. If approved, set Accounting/Status Review for **05/16/19** Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

TRUSTS AND MOTIONS

DATE: 03/08/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1701058

CASE NAME: MTR OF THE LYDIA R GARCIA TRUST

HEARING:

Petition for VERIFIED TRUST CONTEST AND POUR OVER WILL CONTEST
OF CARLOS GARCIA ETC

COUNSEL:

CARLOS GARCIA

THE LYDIA R GARCIA TRUST AND E

(PET)...EDWARD B FISCHER &

(TRU)...

Currently under review by legal research.

30 days' notice filed 10/25/17.

(lc)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIP

DATE: 03/08/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS0800266

CASE NAME: KYLE AVERY TILTON

HEARING: FOURTH & FINAL Account and Report of MELODIE Z SCOTT and
Petition for allowance of fees filed.

COUNSEL:

BRYAN C HARTNELL	(PET)...HARTNELL LAW GROUP
CHRISTINA ERICKSON-TAUBE	(SC)...PRO/PER
JENNIFER L HAAS	(PCR)...
JUDY TILTON	(CPE)... J. DAVID HORSPOOL
KENNETH F JENKINS	(CE)...PRO/PER
KYLE AVERY TILTON	(CEP)...MARTINA KANG RAVICZ
KYLE AVERY TILTON	(CEP)...PRO/PER
MELODIE Z SCOTT	(CPE)...HORSPOOL & HORSPOOL
MELODIE Z SCOTT	(PET)...PRO/PER
NEVIN OLIPHANT	(SC)...J. DAVID HORSPOOL
PACIFIC WESTERN BANK, A CALIFO	(HEMAR, ROUSSO & HEALD, LLP
W.A. (SAM) HLA VATY	(CE)...THOMPSON & COLEGATE
W.A. (SAM) HLA VATY	(CPE)...THOMPSON & COLEGATE
WELLS FARGO BANK, TRUSTEE	(PET)...JENNIFER M DANIEL

XREF: PROPS0900847 (*Kyle Tilton Settlement Trust*)

GENERAL INFORMATION

Continued from **05/19/16**. Court ordered that written objections be filed by 06/01/16.
Responses to be filed by 06/10/16.

Continued from **06/20/16**. Court granted attorney fees of \$28,958.50 and \$5,000 to
Melodie Scott.

Continued from **10/06/16**. Counsel Craig Marshall advises court of a possible issue with
the internal revenue service and asks that case be held over for further review. A
correction to the accounting period is noted by the court. Correct accounting period is
01/01/14 through 09/30/15.

Continued from **11/29/16**. The issue of taxes discussed. It appears 1099s were not filed
and the IRS is adding income as a result. Ms. Ravicz states she intends to object to
accounting. The Court orders any objections to be filed in writing by 12/9/16. Notice to
be given by Mr. Roth.

Continued from **02/21/17**. Objections to be filed by 06/01/16. Objections filed on 12/08/16
stricken as untimely. Attorney Horspool and Mr. Hlavaty are to meet regarding tax issues.

Continued from **08/07/17 and 09/26/17** to meet and confer re settlement.

Continued from 11/09/17. Court will not rule on objections by declarations only an evidentiary hearing will need to be set. Melodie Scott is willing to have \$20,000 tax issued resolved by taking from her fees. Court will not accept waiving of fees without written agreement of 3rd party judgment creditor.

THIS CASE SET FOR HEARING ON 4th and Final Account/Distribution and Petition for Allowance of Fees by Melodie Scott, former Conservator.

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

1. Accounting period 01/01/14 – **09/30/15**.
2. Assets on hand \$0.
3. Attorney requests fees of \$28,958.50 for 77.7 hours at \$295/375 per hour. Itemized [LFpgs70-77]. Granted on 06/20/16.
4. Petitioner requests fees of \$27,693.25 with a balance owed of \$13,993.50 for 246 hours at \$112 per hour [LFpgs44-68]. Periodic payments of \$13,700 were received. Court to inquire why all services are charged at the same rate. **Court granted \$5,000 on 06/20/16.**
5. Petitioner requests funds advanced not reimbursed of \$570.
6. Current bond is \$200,000. Ok.
7. **Objection filed 06/02/16 and 12/08/16 by GAL for Kyle Avery Tilton.**
8. **Objections filed 12/08/16 by Conservatee through court-appointed counsel.**
9. ~Proposed Order: 03/30/16.

RECOMMENDATION

Matter is contested. If approved, set hearing on the filing of receipts and final discharge for **03/14/19**.

(lc/dl/lc/nb/lc)

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

DATE: 03/08/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800018

CASE NAME: THERESA HERNANDEZ JIMENEZ

HEARING:

Hearing Re: PTN FOR APPOINTMENT OF CONSERVATOR

COUNSEL:

ALICE HERNANDEZ	(CPE)...KARIN E HORSPPOOL
ROSEANN ULLOA	(CPE)...KARIN E HORSPPOOL
THERESA HERNANDEZ JIMENEZ	(CEP)...MITCHELL I ROTH
THERESA HERNANDEZ JIMENEZ	(CEP)...PRO/PER

GENERAL INFORMATION

Alice Hernandez and Roseann Ulloa appointed temporary conservators on 02/01/18, person and estate \$100,000 bond. Mitchell Roth appointed counsel.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Alice Hernandez and Roseann Ulloa, daughters.

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

1. Proposed conservatee nominates petitioners.
2. Petitioner seeks no bond as assets are allegedly held in trust. It appears that petitioners allege that Co-Trustee Roy Jimenez, grandson, has misappropriated funds and allowed the manager and foreman of the business "run into the ground". Question if a petition to removed co-trustee will be filed? **Need** verified supplement.
3. Petitioner seeks dementia powers. **Need** report of Counsel Roth.
4. **Need** Certificate of Completion of the Conservatorship Training Class.
5. **Need** Court Investigator report.
6. Petitioner seeks medical powers. Capacity Declaration filed 01/30/18.
7. Citation returned served.
8. ~Proposed Form Order: 01/24/18

RECOMMENDATION

Need to clear notes 2-5. If approved, set hearing for Compliance Review for **10/11/18** for the filing of the required documents and hearing re Accounting Review for **05/16/19**. Any accounting to be filed 30 days in advance.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/08/18 TIME: 9:30 DEPT: S37P

CASE#: EAP PS1800017

CASE NAME: SANDERS VS CASTLEMAN

HEARING:

Hearing Re: ELDER ABUSE RESTRAINING ORDER

COUNSEL:

ANTHONY JOSEPH CASTLEMAN (RP)...
GREGORY T SANDERS (PP)...PRO/PER

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

Need proof of service for respondent Anthony Castleman.

(lc)

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

DATE: 03/08/18 TIME: 9:30 DEPT: S37P

CASE#: SC SS02839
CASE NAME: MTR RE DANIEL P MADRID
HEARING: Eighth and Final Account and Report of CHRISTINA ERICKSON-TAUBE
and Petition for allowance of fees filed.

COUNSEL:

AMERICAN CON TRACTORS IND EMNI	()...
CHRISTINA ERICKSON-TAUBE	(CPE)...ALEX R BORDEN
DANIEL P MADRID	(CEP)...EDWARD B FISCHEL &
EDWARD B. FISCHEL	(PET)...EDWARD B FISCHEL &
ESMERALDA MADRID	(CE)...
MELODIE Z SCOTT	(CPE)...KARIN HORSPOOL
MELODIE Z SCOTT	(TP)...PRO/PER

GENERAL INFORMATION

Continued from 12/14/17. Referred to Court Investigator. Ed Fischel to prepare report of Petition to Terminate.

THIS CASE SET FOR HEARING ON 8th and Final Account and Petition to Terminate by Christina Erickson Taube, PPF.

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

1. Accounting period 08/01/16 – 07/31/17.
2. Assets on hand \$1,057.41 cash.
3. Conservator seeks termination on that basis that conservatee was deemed as competent by Veteran's Administration on 10/13/16. [Acct.10/27LFpg37].
Conservatee receives benefits directly from Veteran's and Social Security Administration. No assets will remain after fees.
4. Petitioner seeks exoneration of bond. However, petitioner does not seek discharge per Pr.C. § 2626.
5. Attorney seeks fees of \$7,168 for 21.2 hours at \$135/390 per hour for paralegal and attorney services and reimbursement of costs totaling \$202. [Acct.10/27LFpg43-45].
6. Conservator seeks fees of \$10,421.50 at \$65-115 per hour. Itemized, hours not totaled. [Acct.10/27LFpg23-35].
 - a. Court to inquire why calls from conservatee are billed at \$115 per hour and account reconciliation is \$65 per hour.
 - b. Periodic fees of \$17,555.75 were paid; however, no calculation provided for fees paid as opposed to fees owed. **Need** verified supplement.

7. **Need** report of Ed Fischel.
8. **Need** Court Investigator report.
9. ~Proposed Order: 10/27/17.

RECOMMENDATION

Need to clear notes 6-8. If approved, set hearing on the filing of receipts and final discharge for **03/14/19**.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 22 ADD ON

CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

MISC.

DATE: 03/08/18 TIME: 1:30 DEPT: S37P

CASE#: CON PS1700147

CASE NAME: ROBERT JOHNSON

HEARING:

Court Trial set for PETITION FOR CONSERVATORSHIP of BOBBIE
ROBERTSON

COUNSEL:

BOBBIE ROBERTSON (PET)...PRO/PER
ROBERT JOHNSON (CEE)...WALTER T. MOORE

Trial – No notes – JTD