



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 03/12/18**

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.

(02/22/18 & 03/06/18 ww) (02/23/18 & 03/06/18 cs)

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: 03/12/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500100

CASE NAME: MTR OF AMPARO V RAMOS

**SEE ALSO 2**

HEARING:

Hearing Re: TRIAL SETTING CONFERENCE

COUNSEL:

SANDRA L MARTINEZ (PET)...PRO/PER

DONALD F RAMOS (PET)...FULLERTON LEMANN SCHAEFER & DO

RONALD R RAMOS (PET)...PRO/PER

AMPARO V RAMOS (DEC)...

SUSAN L FLORES (PET)...BETTY AUTON-BECK

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

No Notes-Trial setting conference. JTD.

(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: 03/12/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500100

CASE NAME: MTR OF AMPARO V RAMOS

**SEE ALSO 1**

HEARING:

Accounting Review

COUNSEL:

SANDRA L MARTINEZ (PET)...PRO/PER  
DONALD F RAMOS (PET)...FULLERTON LEMANN SCHAEFER & DO  
RONALD R RAMOS (PET)...PRO/PER  
AMPARO V RAMOS (DEC)...  
SUSAN L FLORES (PET)...BETTY AUTON-BECK  
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP )...

GENERAL INFORMATION:

Continued from **07/10/17**.

**Continued from 01/22/18. Court orders Sandra Martinez and Ronald Ramos to be personally present in court on March 12, 2018 at 8:30am in department S35. If they have retained counsel, and substitution of attorney has been filed, the counsel for them is to be personally present in court on March 12, 2018 at 8:30am in department s35. Court call is not permitted.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration with will annexed issued 12/08/16 to Sandra L. Martinez, Donald F. Ramos and Ronald R. Ramos, children, full authority, no bond.
2. **Need** Final Inventory and Appraisal with supporting bank/financial statements per Local Rule 20-908.
3. **Need** accounting or status report.

RECOMMENDATION:

Inquire status.

(nb/ww)

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

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DATE: 03/12/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500122

CASE NAME: William Robert Brown

HEARING:

first and final Account and Report of ROBERTA ELLEN BROWN and  
Petition for allowance of fees filed.

COUNSEL:

ROBERTA ELLEN BROWN (PET)...CRAIG E WILSON  
WILLIAM ROBERT BROWN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by  
Roberta Brown, executor/mother

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

- 1 Assets on hand: \$360,000.00 in real property
- 2 All beneficiaries waive accounting.
- 3 Petitioner waives statutory commissions.
- 4 Attorney requests statutory fees of \$10,200.00 Calculated.
- 5 Attorney requests reimbursement for advanced costs in the amount of \$991.00.  
Itemized. [LF pg. 6]
- 6 Notice given.
- 7 **Notice of Non-Payment of Statutory Fees and Expenses in the amount of  
\$395.00 filed by Burdette Garvin, Probate Referee on 01/30/18.**
- 8 Proposed Order: 11/27/17

RECOMMENDATION:

Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge  
for **03/18/19**.

(ww)

Superior Court of Calif, County of San Bernardino

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

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DATE: 03/12/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1501042

CASE NAME: LINDA SWAN

HEARING: re Final Discharge

COUNSEL:

LAUREN SWAN VAN LENT (PET)...PRO/PER  
LINDA SWANN (DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. First and Final Account was approved on 03/06/17.
2. Need receipt from Lauren Van Lent.
3. Need Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION:

Need to clear notes.

(cs)

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

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DATE: 03/12/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600241

CASE NAME: MTR OF ROBERT G MURRAY

HEARING:  
Accounting Review

COUNSEL:

ROBYN L MURRAY (PET)...ROBERT W CANNON  
ROBERT G MURRAY (DEC)...

GENERAL INFORMATION

Continued from **07/05/17**.

**Continued from 11/06/17 Matter is continued for counsel to file accounting- Court sets filing deadline of 4pm February 5, 2018. Clerk's office is ordered to set the accounting for March 12, 2018 if the account is filed by the aforementioned deadline of February 5, 2018.**

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters Testamentary issued to Robyn Murray, spouse, on 05/04/16; full authority, no bond.
2. Final Inventory and Appraisal filed 09/28/17.
3. **Need** accounting or status report.

RECOMMENDATION

Inquire status of accounting.

(lc/ww)

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

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DATE: 03/12/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600822

CASE NAME: MTR OF RODERICK YZAGUIRRE

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

COUNSEL:

MEDHAT NASHED	(PET)...KRISTEN B. BROWN
RODERICK YZAGUIRRE	(DEC)...
JULIE WERTS	(PET)...PRO/PER
JILL YZAGUIRRE	(OBJ)...PRO/PER

**XREF: CIVDS1511117** *NASHED -V- YZAGUIRRE*

GENERAL INFORMATION

**Continued from 01/29/18 at request s of petitioner to file proof of publication.**

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Julie Werts, administrator/nominee/petitioner

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

1. Petitioner seeks bond waiver. Estate value is zero. 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. Section 4 of notice of petition to administer estate, filed 02/09/18, indicates decedent's will and codicils if any be admitted to probate. JTD
3. Proof of publication contains verbiage pertaining to a will. JTD
4. Nomination by son affixed to petition.
5. No proposed form Order: Submit after hearing.

RECOMMENDATION

RFA Court's discretion re bond, note 2 and 3. If approved, set Accounting/Status Review for **05/20/19**. 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: STANFORD E. REICHERT

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DATE: 03/12/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700071  
CASE NAME: KATHLEEN ANN FORTIER

HEARING: First and Final Account and Report of JASON ANDREW FORTIER and  
Petition for allowance of fees filed.

COUNSEL:

JASON ANDREW FORTIER (PET)...PRICE LAW FIRM, APC  
KATHLEEN ANN FORTIER (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by  
Jason Fortier, son/executor

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

1. Assets on hand: \$481,839.61 in cash and investments
2. Petitioner and Attorney request statutory fees of \$12,784.00 in the report and \$12,963.74 in the prayer. Court may wish to clarify the requested statutory fee amount? Calculated. **JTD**
3. Attorney request extraordinary fees of \$270.00 for 1.8 hours of service at \$150.00 for paralegal time to sell the real property. Itemized. [LF pg. 22] **JTD**
  - a. Need qualifications of paralegal, Michelle DeJohnette, that meet the requirements of CRC 7.703(e)(1)(c) which requires a showing of completion of mandatory continuing education per Business & Professions Code 6450(d). **Need** verified supplement.
4. Charges and Credits of summary of account do not match. Does Court wish to deem deficiency of \$321.20 as de minimis? [LF pg. 13] **JTD**
5. Calculation of amount left for distribution in item 31 is incorrect. **Need** verified supplement regarding correct amount of cash available for distribution. [LF pg. 9]
6. Report indicates that the bank statement is filed concurrently under a confidential cover but none was provided. **Need** bank/investment statements verifying date of death balances per Local Rule 20-908.
7. **Need** copy of escrow closing statement for sale of real property per Local Rule 20-910.
8. Petitioner requests a reserve of \$2,000.00 for closing expenses. **JTD**
9. Notice given.
10. No proposed order. Submit order after hearing.



RECOMMENDATION:

Need to clear notes 3a & 5-7 then Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge for **03/18/19**.

(ww)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 03/12/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1700422

**VACATED**

CASE NAME: MTR OF CLYDE GERALD BALLIER

HEARING:

Waiver of account and for final distribution.

COUNSEL:

RANDALL M BALLIER

(PET)...PRO/PER

CLYDE GERALD BALLIER

(DEC)...

(ww)

Future hearing dates: 02/05/19 Hearing re Final Discharge

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 03/12/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800113

CASE NAME: ROBERT FERDINAND BUESCHING

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

COUNSEL:

ROBERTA L. BUESCHING (PET)...ALBREKTSON & SHUMATE  
ROBERT FERDINAND BUESCHING (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Roberta Buesching, daughter/petitioner

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

1. Petitioner seeks bond of \$842,000.00. Estate value is \$842,000 with \$555,000 in personal property. Bond appears adequate.
2. Need proof of publication.
3. ~Proposed Form Order: 02/07/18
4. Competing Petition filed and is set for 04/18/18. Court may wish to trail matter. JTD

RECOMMENDATION

Need to clear notes 2. Court's discretion re bond and note 4. If approved, set Accounting/Status Review for **05/20/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 03/12/18 TIME: 8:30 DEPT: S35P  
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CASE#: SPR SS07243

CASE NAME: MTR OF MAGGIE BROWN

HEARING:  
Hearing re Final Discharge

COUNSEL:  
PATRICIA BROWN (PET)...HARTNELL, LISTER & MOORE  
MAGGIE BROWN (DEC)...

#### GENERAL INFORMATION

**Continued from 08/28/17 and 12/04/17**

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Final Account and Report by Patricia Brown approved on 06/20/16.
2. Need receipts from Donna Brown, Karen Demory, Paul Brown, Brandn "Bill" Swayne, Brian Swayne, Bezeairlu Brown, Clifford Brown, Delories Swayne, Patricia Brown and San Bernardino County Treasurer for Cedric Brown.
3. Need Ex Parte Petition for Final Discharge and Order.

#### RECOMMENDATION

Inquire status.  
(lh/cs)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 03/12/18 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1601182

CASE NAME: JOHN M. VAN ZANDT REVOCABLE LIVING TRUST

**SEE ALSO 12**

HEARING:

Petition for instruction and for authority to sell real property

COUNSEL:

HEIDI HUTLEY (PET)...JOSEPH A WALKER  
JOHN A VANZANDT REVOCABLE LIVING TRUST (TRU)...  
WILLINE GAUDREAU (PET/RES)...BROWN WHITE & OSBORN  
STEVEN GARUDRAU  
ROBERT GAUDREAU  
KATHRYN GAUDREAU  
CAROL KILLEN  
BILL GAUDREAU  
STEPHANIE GAUDREAU  
SUN WEST MORTGAGE CO (WOLFE & WYMAN LLP)  
JAY GAUDREAU

Currently under review by Legal Research

LR

NOTICE:

Notice given.

(ww)

Future Hearings: 5/22/19: Readiness Calendar, Petition for Lack of Capacity Undue Influence ETC,  
Hearing Re: Verified 1<sup>st</sup> Amended Petition  
6/18/18: Court Trial, Petition for Lack of Capacity Undue Influence ETC  
1/15/19: 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

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DATE: 03/12/18 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1601182

CASE NAME: JOHN M. VAN ZANDT REVOCABLE LIVING TRUST

**SEE ALSO 11**

HEARING:

Petition for PRELIMINARY INJUNCTION ENJOINING TRUSTEE SALE

COUNSEL:

HEIDI HUTLEY (PET)...JOSEPH A WALKER  
JOHN A VANZANDT REVOCABLE LIVING TRUST (TRU)...  
WILLINE GAUDREAU (PET/RES)...BROWN WHITE & OSBORN  
STEVEN GARUDRAU  
ROBERT GAUDREAU  
KATHRYN GAUDREAU  
CAROL KILLEN  
BILL GAUDREAU  
STEPHANIE GAUDREAU  
SUN WEST MORTGAGE CO (WOLFE & WYMAN LLP)  
JAY GAUDREAU

Currently under review by Legal Research.  
(LR)

Continued matter – notice not re-reviewed.

(ww)

Future Hearings: 5/22/19: Readiness Calendar, Petition for Lack of Capacity Undue Influence ETC,  
Hearing Re: Verified 1<sup>st</sup> Amended Petition  
6/18/18: Court Trial, Petition for Lack of Capacity Undue Influence ETC  
1/15/19: Accounting Review

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

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DATE: 03/12/18 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1701213

CASE NAME: WESSEL HUGH MEYERS TRUST

HEARING:

Petition for ORDER DETERMINING INTEREST IN RESL AND PERSONAL  
PROPERTY AND TRANSFER TO TRUSTEE

COUNSEL:

ROBIN K WIPPICH	(PET)...BRIAN J HOLOHAN
WESSEL HUGH MEYERS TRUST	(DEC)...

Currently under review by Legal Research.  
(LR)

Continued matter – notice not re-reviewed.

(ww)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**CONSERVATORSHIPS**

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DATE: 03/12/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1100071

CASE NAME: ROBERT SANCHEZ TORRES JR

HEARING: Re: REPORT OF COURT APPOINTED COUNSEL

COUNSEL:

ERIKA R TORRES

(CP )...PRO/PER

ROBERT SANCHEZ TORRES JR

(CTP)...WALTER T. MOORE

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Report Of Court Appointed Counsel

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

1. Matter set on court's own motion after review of CI Report dated 02/07/18 and ordered Walter Moore be reappointed as counsel for conservatee, Robert Torres, Jr.
2. **Need** report of court appointed counsel, Walter Moore.

RECOMMENDATION:

Need report.

(cs)



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Page: 14A add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 03/12/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1300251

CASE NAME: HARRIS R KHAN

Hearing Re: ISSUE OF UNFENCED POOL

	COUNSEL:
ASMAT KHAN	(CP)...PRO/PER
HARRIS R KHAN	(CTP)...MARK J ANDREW FLORY

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Report of Court Appointed Counsel

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

1. Matter set on 02/27/18 on Court's own motion after review of CI Report to address the unfenced pool mentioned in report.

RECOMMENDATION:

Court's discretion.

(cs)

Superior Court of Calif, County of San Bernardino  
Page: 14B add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 03/12/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1400033

CASE NAME: Gabriel Sean Moore

Hearing Re: COURT SETS HEARING FOR MARCH 12, 2018 TO ADDRESS CI  
MEMO

COUNSEL:

ELLEN LEAH CHRISTY (CP)...PRO/PER  
GABRIEL SEAN MOORE (CTP)...SHERRI L KASTILAHN

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Report of Court Appointed Counsel

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

1. Matter set on Court's own motion to address CI Memo.

RECOMMENDATION:

Court's discretion.

(cs)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PUBLIC GUARDIAN**

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DATE: 03/12/18      TIME: 10:00      DEPT: S35P  
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CASE#: CON PS1100252

CASE NAME: PAUL JEFFERSON

**SEE ALSO 16 17**

HEARING:

Hearing Re: STATUS OF SOCIAL SECURITY/C'TORSHIP OF PERSON

COUNSEL:

SONDRA JEFFERSON	(CPE)...CHO, SHEASBY, CHUNG & IGNACIO
PAUL JEFFERSON	(CEP)...SANDY TURNER
MATTHEW E SHAESBY	(PET)...MATTHEW E SHEASBY
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ANITA PETTI	(CPE)...LAW OFFICE OF MARY M. BADER
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
SHIRLEY M JEFFERSON	(CP )...CHRISTINA FERRANTE
DEMETRIUS JEFFERSON	(CE )...CHRISTINA FERRANTE
UTILITY MANUFATURING	(OBJ)...
ROBERT R. SHIRI	(ROBERT R SHIRI)

No Notes-Status- JTD.

(ww)

Future Hearing: 7/30/18: Hearing Re: Amended Itemized Accounting & Request etc

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

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DATE: 03/12/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1100252

CASE NAME: PAUL JEFFERSON

**SEE ALSO 15 17**

HEARING:

Hearing Re: REQUEST TO TERMINATE CONSERVATORSHIP OF PERSON

COUNSEL:

SONDRA JEFFERSON	(CPE)...CHO, SHEASBY, CHUNG & IGNACIO
PAUL JEFFERSON	(CEP)...SANDY TURNER
MATTHEW E SHAESBY	(PET)...MATTHEW E SHEASBY
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ANITA PETTI	(CPE)...LAW OFFICE OF MARY M. BADER
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
SHIRLEY M JEFFERSON	(CP )...CHRISTINA FERRANTE
DEMETRIUS JEFFERSON	(CE )...CHRISTINA FERRANTE
UTILITY MANUFATURING	(OBJ)...
ROBERT R. SHIRI	(ROBERT R SHIRI)

Waiver of Court Fees and Costs filed by ANITA PETTI is GRANTED

GENERAL INFORMATION:

Order Appointing Public Guardian as Successor Conservator of the Person and Estate entered 04/19/16.

Continued from **07/24/17**. Attorney Sandy Turner present and Mitchel Roth (GAL) appeared by Court Call.

Continued from **10/30/17** Public Guardian is ordered to contact social security office forthwith; Paul Jefferson to cooperate with the Public Guardian with process of issues with the social security office. Court sets for hearing issue of request for reimbursement by Shirley Jefferson for January 8, 2018 at 10:00am in S35. Court sets for trial (with three half day time estimate) the issue of terminating conservatorship of estate. exchange deadline set for 4pm November 3, 2017. Court continues over to the next date of 11-13-17 at 1:30pm the issues of status of conservatorship of person and social security- Court notes that these issues are not set for trial. Hearing re osc re why bills have not been turned over is off calendar as matter of petition to terminate conservatorship of estate is set for trial in November 2017.

**Continued from 11/13/17.**

THIS CASE IS SET FOR HEARING ON Petition for Termination of Successor Conservatorship of the Person and Estate by Conservatee, Paul L. Jefferson ["Petitioner"].

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

1. Petitioner alleges a conservatorship of the person and estate is no longer necessary as he was misdiagnosed and is no longer taking psychotropic medication; now has some mental clarity; and is able to function at a higher level to his best ability.
2. Petitioner alleges the best interest of the conservatee require termination of the conservatorship of the person and estate.
3. Petitioner requests an order of this court terminating the conservatorship of the person and estate.
4. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion.

(nb/lh/ww)

Future Hearing: 7/30/18: Hearing Re: Amended Itemized Accounting & Request etc

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

-----  
DATE: 03/12/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1100252

CASE NAME: PAUL JEFFERSON

**SEE ALSO 15 16**

HEARING:

Hearing Re: REQUEST FOR REIMBURSEMENT BY SHIRLEY JEFFERSON

COUNSEL:

SONDRA JEFFERSON	(CPE)...CHO, SHEASBY, CHUNG & IGNACIO
PAUL JEFFERSON	(CEP)...SANDY TURNER
MATTHEW E SHAESBY	(PET)...MATTHEW E SHEASBY
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ANITA PETTI	(CPE)...LAW OFFICE OF MARY M. BADER
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
SHIRLEY M JEFFERSON	(CP )...CHRISTINA FERRANTE
DEMETRIUS JEFFERSON	(CE )...CHRISTINA FERRANTE
UTILITY MANUFATURING	(OBJ)...
ROBERT R. SHIRI	(ROBERT R SHIRI)

GENERAL INFORMATION:

Matter was set on 10/23/17. Per minute order on 04/10/17 Court ordered that Petitioner, Shirley Jefferson was to continue to pay all bills but will be reimbursed pending hearing.

**Continued from 01/08/18 Mitchell Roth, Guardian ad litem, states his opinion as guardian ad litem as to the request for reimbursement by Shirley Jefferson on the record- that he recommends that the court deny the request for reimbursement. Court notes Mitchell Roth has been relieved as GAL. Court orders that Paul Jefferson is to bring with him to the court date of March 12, 2018 every bill, invoice, credit card statement, bank statement, and any statement/invoice that he has regarding his financial information, Sandy Turner makes oral request for the exhibits to be turned over to her; Court grants the request- Court orders the exhibits a through e and 1 through 6 to be turned over to Sandy Turner.**

THIS CASE SET FOR HEARING ON Request For Reimbursement By Shirley Jefferson

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

1. Petitioner, Shirley Jefferson (mother) requests reimbursement for money advanced on behalf of the Conservatee for the period of 12/01/16 to 05/30/17 in the amount of \$18,547.27 [Amended Itemized Accounting filed 10/26/17, LF p.6 – 12].

2. Amended itemized accounting filed 10/26/17 indicates the amount of \$900 for Desert Villas was inadvertently added to original itemized accounting and the amount of \$684 and \$120 were inadvertently left out from original accounting.

**RECOMMENDATION:**

Court's discretion.

(cs/ww)

Future Hearing: 7/30/18: Hearing Re: Amended Itemized Accounting & Request etc

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 03/12/18      TIME: 10:00      DEPT: S35P  
-----

CASE#: CON PS1200052

**VACATED**

CASE NAME: PEGGY MCCONNELL

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUADIAN

PEGGY MCCONNELL

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

(ww)

Future hearing dates: 01/28/19 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

-----  
DATE: 03/12/18      TIME: 10:00      DEPT: S35P  
-----

CASE#: CON PS1300289

**VACATED**

CASE NAME: LAURA BEARD

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

LAURA BEARD

(CEP)...HARTNELL LAW GROUP

(ww)

Future hearing dates: 04/01/19 Accounting Review

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

-----  
DATE: 03/12/18 TIME: 10:00 DEPT: S35P  
-----

CASE#: CON PS1400164

CASE NAME: JARROD J CHAPMAN

HEARING:

FIRST Account and Report of PUBLIC GUARDIAN and Petition for Allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
JARROD J CHAPMAN (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees by Conservator of the Person and Estate, Public Guardian ["Petitioner"].

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

1. Accounting period: 05/28/14-07/30/15
2. Assets on Hand: \$386.93 in cash.
3. Public Guardian requests compensation in the amount of \$2,600.00, deferred until such time as the conservatorship estate has sufficient funds for such purpose.
4. County Counsel request fees in the amount of \$1,300.00, deferred until such time as the conservatorship estate has sufficient funds for such purpose.
5. Notice given.
6. ~Proposed Order: 11/21/17

RECOMMENDATION:

Court's discretion. If approved, set for next Accounting Review in 60 days as second account current 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: 03/12/18 TIME: 10:00 DEPT: S35P  
-----

CASE#: CON PS1700050

CASE NAME: MTR OF KATHERINE POWELL

**SEE ALSO 22 23 24 25**

HEARING:

Hearing Re: AMENDED PETITION FOR APPOINT OF TEMP CONS(PER/EST)

COUNSEL:

PUBLIC GUARDIAN (CE)...COUNTY COUNSEL  
KATHERINE POWEL (CTE)...MITCHELL I ROTH

**XREF: CONPS1700074** MTR OF WILLARD POWELL

No notes- JTD.

(ww)

Future Hearing: 4/03/18: Court Trial

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 03/12/18 TIME: 10:00 DEPT: S35P  
-----

CASE#: CON PS1700050

CASE NAME: MTR OF KATHERINE POWELL

**SEE ALSO 21 23 24 25**

HEARING:

Petition for Appointment of Conservator

COUNSEL:

PUBLIC GUARDIAN (CE)...COUNTY COUNSEL  
KATHERINE POWEL (CTE)...MITCHELL I ROTH

**XREF: CONPS1700074** MTR OF WILLARD POWELL

#### GENERAL INFORMATION

**Ex parte hearing held 03/20/17.** Mitchell Roth states objections on record on behalf of his client. Public Guardian (PG) appointed Temporary Conservator of estate only. No bond required. Court resets hearing currently set for 05/01/17 to 05/08/17. Court appoints Sherri Kastilahn as Guardian Ad Litem for Katherine Powell  
Continued from **05/08/17** at request of counsel. Notice to be given by Ramona Verduzco.  
Continued from **07/31/17**. Written report received from Sherri Kastilahn (GAL). Matter is contested. Exchange deadline set for 4:00pm on 01/22/18. Court makes Pre Trial Orders.  
**Continued from 01/22/18. Matter is set with new trial dates.**

THIS CASE IS SET FOR HEARING ON **Amended Petition** [filed 08/14/17] for appointment of Conservatorship of PERSON and ESTATE, by PG

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

1. No bond - PG.
2. Petitioner seeks Pr. C. § 2590 powers to sell real or personal property of the estate and proceeds to be used for Conservatee's care and personal needs.
3. Petitioner seeks authority to deposit up to \$5,000 in an irrevocable burial trust and authority to abandon and/or donate personal property with value of \$300 or less; storage or a sale would be a burden on the estate.
4. Petitioner seeks medical powers. Capacity Declaration filed 08/03/17.
5. Petitioner seeks dementia powers. Initial report of Counsel Mitchell Roth filed 05/09/17. **Need** report as to amended petition.
6. **Need** report of GAL, Sherri Kastilahn as to amended petition.
7. CI report filed 05/03/17. **Need** CI Report as to amended petition.

8. Confidential memo by CI filed 08/29/17.
9. Return of Citation with Proof of Service filed 10/03/17.
10. Notice was served.

**RECOMMENDATION:**

Need to clear probate notes 5-7. 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; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **05/20/19**. Any accounting to be filed 30 days in advance.

(lh/nb/lh/ww)

Future Hearing: 4/03/18: Court Trial

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 03/12/18 TIME: 10:00 DEPT: S35P  
-----

CASE#: CON PS1700050

CASE NAME: MTR OF KATHERINE POWELL

**SEE ALSO 21 22 24 25**

HEARING:

Readiness Calendar

COUNSEL:

PUBLIC GUARDIAN

KATHERINE POWEL

(CE)...COUNTY COUNSEL

(CTE)...MITCHELL I ROTH

**XREF: CONPS1700074** *MTR OF WILLARD POWELL*

No Notes-Readiness. JTD.

(ww)

Future Hearing: 4/03/18: Court Trial

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

-----  
DATE: 03/12/18 TIME: 10:00 DEPT: S35P  
-----

CASE#: CON PS1700074

CASE NAME: MTR OF WILLARD POWELL

**SEE ALSO 21 22 23 25**

HEARING: Petition for Appointment of Conservator

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
WILLARD POWELL (CEP)...JEANNE KENNEDY

**XREF: CONPS1700050** MTR OF KATHERINE POWELL

GENERAL INFORMATION

**Ex parte orders entered 03/20/17.** Attorney Jeanne Kennedy appointed for Willard Powell. Jeanne Kennedy states objections on record on behalf of her client. Public Guardian (PG) is appointed Temporary Conservator of person/estate. Court orders that before Willard Powell is moved out of his house, a hearing/court order is required. No bond is required. Court appoints Walter Moore as Guardian Ad Litem for Willard Powell. Court orders case coordinated with CONPS1700050.

Continued from **05/08/17** at request of counsel. Notice to be given by Ramona Verduzco. Continued from **07/31/17** Court orders that the bank is not to permit any further withdrawals by Katherine and Willard Powell of any and all bank accounts that they are listed on unless it is by order of the Court. Court orders Public Guardian to be designated person for paying bills of Katherine and Willard Powell. Court orders Valerie Moore (aka Valiree Moore) to be excluded from any and all financial information (any and all bank accounts), medical bills, utility bills and is not to have any access to financial or any type of bank account re their information, dealings, financial activities.

**Continued from 01/22/18 Court order the title of van is to be transferred to Katherine Powell and/or Willard Powell as the registered owners of the van as joint owners.**

THIS CASE IS SET FOR HEARING ON Petition for appointment of Conservatorship of ESTATE only, by PG

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

1. No bond - PG.
2. Petitioner seeks Pr. C. § 2590 powers to sell real or personal property of the estate and proceeds to be used for Conservatee's care and personal needs.

3. Petitioner seeks authority to deposit up to \$5,000 in an irrevocable burial trust and authority to abandon and/or donate personal property with value of \$300 or less; storage or a sale would be a burden on the estate.
4. Petitioner seeks medical and dementia powers. Updated Capacity Declaration filed 08/03/17.
5. Petitioner seeks dementia powers. **Need** report from Counsel Jeanne Kennedy.
6. Petition is incomplete. **Need** verified supplement clarifying the following:
  - a. Section 5f [LF, pg7] as to whether proposed conservatee is developmentally disabled.
7. **Need** report of court-appointed counsel, Jeanne Kennedy.
8. **Need** report of GAL, Walter Moore.
9. **Need** Notice of Hearing and Proof of Service.
10. Return of Citation with Proof of Service filed 03/15/17.
11. Court Investigator's Report filed.
12. **Objections filed 05/02/17 by Willard Powell, Proposed Conservatee.**

RECOMMENDATION: Set for contested hearing.

Need to clear notes 5-9, then 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); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **05/20/19**. Any accounting to be filed 30 days in advance.

(lh/nb/cs)

Future Hearing: 4/03/18: Court Trial



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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 03/12/18      TIME: 10:00      DEPT: S35P  
-----

CASE#: CON PS1700074

CASE NAME: MTR OF WILLARD POWELL

**SEE ALSO 21 22 23 24**

HEARING:

Readiness Calendar

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

WILLARD POWELL

(CEP)...JEANNE KENNEDY

**XREF: CONPS1700050** *MTR OF KATHERINE POWELL*

No Notes-Readiness. JTD.

(cs)

Future Hearing: 4/03/18: Court Trial

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

-----  
DATE: 03/12/18 TIME: 10:00 DEPT: S35P  
-----

CASE#: CON PS1700229

CASE NAME: GABRIEL SILVA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of PUBLIC GUARDIAN

COUNSEL:

PUBLIC GUARDIAN (PET)...COUNTY COUNSEL  
GABRIEL SILVA (CTP)...EDWARD B FISCHER

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. PG appointed conservator of the person and estate on 08/07/17, No bond.
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.
5. **Need** Final Inventory & Appraisal per Pr.C.§2610.
6. **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
7. If the conservatorship estate holds interest in real property, **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.

#### RECOMMENDATION

Need to clear notes 2-7.

(ww)

Future Hearing: 10/15/18: Accounting Review

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

-----  
DATE: 03/12/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1700434

CASE NAME: Sue Han

HEARING: Petition for Appointment of Conservator

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
SUE HAN (CEP)...SANDRA TURNER

GENERAL INFORMATION

Public guardian appointed temporary conservator on 12/11/17.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, of the person and estate, by Public Guardian, Petitioner

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

1. No bond – Public Guardian.
2. Petitioner seeks Pr. C. § 2590 powers to sell real or personal property of the estate and proceeds to be used for Conservatee’s care and personal needs.
3. Petitioner seeks authority to deposit up to \$5000 in an irrevocable burial trust and purchase cemetery commodities. Also seeks authority to abandon and/or donate personal property with value of \$300 or less; as a sale would be a burden on the estate.
4. Petitioner seeks medical powers. Capacity Declaration filed 11/29/17.
5. Citation with proof of service filed 12/07/17.
6. Petitioner seeks dementia powers. Report of Court appointed counsel, Sandy Turner filed 03/05/18.
7. **Need** Duties and Liabilities form.
8. Court Investigator report filed 02/28/18.
9. ~Proposed Form Order: 11/29/17.

RECOMMENDATION

Need to clear notes 7.. 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); including a Determination of Conservatee’s Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Care Plan per Pr.C.§2352.5; Inventory and Appraisal,

and Proof of service of I & A Instructions for Objection per Pr.C. §2610; and recordation of letters, if applicable, per Pr.C. § 2313.

Set hearing re Accounting Review for **05/20/19**. Any accounting to be filed 30 days in advance.

(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: 03/12/18 TIME: 10:00 DEPT: S35P  
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CASE#: SG SS5942

CASE NAME: IN THE MATTER OF JAMES PERRENOUD

HEARING:  
Accounting Review

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
JAMES PERRENOUD (CEP)...

GENERAL INFORMATION

**Continued from 10/03/16 and 06/05/17.**

THIS CASE IS SET FOR HEARING ON Accounting review.

1. Ex Parte Order that Conservator need not present 39<sup>th</sup> approved on 09/26/14.
2. Conservatee died on 07/28/16.
3. **Need** 40<sup>th</sup> and final accounting to include pre and post death accounting periods beginning with date of 07/03/14.

RECOMMENDATION:  
Inquire status of accounting.

(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: 03/12/18 TIME: 10:00 DEPT: S35P  
-----

CASE#: SLC SS01252

CASE NAME: IN THE MATTER OF GRAHAM CASTLE

HEARING:

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

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
GRAHAM CASTLE (CEP)...HARTNELL LISTER & MOORE

GENERAL INFORMATION:

Letters expire: 07/21/18

THIS CASE IS SET FOR HEARING ON Thirteenth Account Current and Petition for Fees  
by Conservator of the Person and Estate, Public Guardian ["Petitioner"].

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

1. Accounting period 01/31/15-07/31/16
2. Assets on Hand \$19,222.63 in cash and investments
3. Public Guardian requests approval and confirmation of fees totaling \$3,800.00  
previously collected by petitioner. Generally itemized. **JTD**
4. County Counsel request approval and confirmation of fees in the amount of  
\$1,900.00 previously collect by attorney. Generally itemized. **JTD**
5. Petitioner and attorney's signatures are not dated. [LF pg. 7] **JTD**
6. Notice given.
7. Proposed Order: fees of \$3,800 and \$1,900 were already collected per petition  
but order does not indicate as such.

RECOMMENDATION:

Court's discretion. If approved, set for next Accounting Review in 60 days as Fourteenth  
account current 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: 03/12/18      TIME: 10:00      DEPT: S35P  
-----

CASE#: SLC SS02417

**VACATED**

CASE NAME: MTR OF JACKIE BIRDSALL

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

JACKIE BIRDSALL

(CEP)...HARTNELL LAW GROUP

(ww)

Future hearing dates: 03/28/18 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: 03/12/18      TIME: 10:00      DEPT: S35P  
-----

CASE#: SLC SS02688

CASE NAME: MTR RE NELLY RAMIREZ

HEARING: Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

NELLY RAMIREZ

(CEP)...HARTNELL LAW GROUP

Ex Parte Order that Conservator need not present 13<sup>th</sup> Account by PG approved and forwarded to Clerk's office for filing on 03/01/18. Next Accounting Review date to be set on **02/25/19**.

(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: 03/12/18 TIME: 10:00 DEPT: S35P  
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CASE#: SLC SS02775

CASE NAME: MATTER OF JOHN DRUMMOND

HEARING:  
Accounting Review

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
JOHN DRUMMOND (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expired: 02/17/18

**Continued from 01/22/18.**

THIS CASE IS SET FOR HEARING ON accounting review

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

1. Ex parte petition to dispense with 9<sup>th</sup> accounting by PG approved on 01/19/17.
2. **Need** 10<sup>th</sup> accounting or waiver of accounting beginning with 09/01/15.

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: 03/12/18      TIME: 10:00      DEPT: S35P  
-----

CASE#: SLC SS02917

**VACATED**

CASE NAME: MTR RE VICTOR LEE MATSON

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

VICTOR MATSON

(CEP)...HARTNELL LAW GROUP

(ww)

Future hearing dates: 03/28/18 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: 03/12/18      TIME: 10:00      DEPT: S35P  
-----

CASE#: SLC SS03059

**VACATED**

CASE NAME: MTR RE URSULA UNKNOWN

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN  
URSULA UNKNOWN

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

(ww)

Future hearing dates: 04/08/19 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

-----  
DATE: 03/12/18 TIME: 10:00 DEPT: S35P  
-----

CASE#: VC VS353

CASE NAME: IN THE MTR OF COOKY JOY VICE

HEARING:

Accounting Review

COUNSEL:

FRED CRAIG VICE	(PLA)...
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
COOKY LEE VICE	(CEP/PLA)...HARTNELL LAW GROUP
JOY TIPPITT	(OBJ)...

GENERAL INFORMATION

**Continued from 07/24/17.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 7<sup>th</sup> Account by PG approved on 08/31/15.
2. **Need** 8<sup>th</sup> account or waiver of account beginning with date of 11/27/14.

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 **MISC.**

-----  
DATE: 03/12/18 TIME: 1:30 DEPT: S35P  
-----

CASE#: PRO PS1500463

CASE NAME: MTR OF WILLIE ANDREW MANN TRUST

**SEE ALSO 37**

HEARING:

Hearing Re: COURT TRIAL ON PTN TO ESTABLISH TRUST (FIRST DAY)

COUNSEL:

WILLIE ANDREW MANN TRUST

(TRU)...

CHAUNCEY MANN II

(PET)...JACK B. OSBORN

OASIS INVESTMENT PROPERTIES

(TP )...ANDERSON,MCPHARLIN & C

LANDWOOD TITLE COMPANY

(PRENOVOST NORMANDIN BERGH

F.M. TARBELL CO

(PRENOVOST NORMANDIN BERGH

FIRST AMERICAN TITLE INSURANCE

(MARK H MCGUIRE)

MENNIE MANN

(PRO/PER)

SHANNON D NOBLE

No Notes-Court Trial- JTD.

(ww)

Future Hearings: 3/13/18-3/16/18: Court Trial

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 03/12/18      TIME: 1:30      DEPT: S35P  
-----

CASE#: PRO PS1500463

CASE NAME: MTR OF WILLIE ANDREW MANN TRUST

**SEE ALSO 36**

HEARING:

Hearing Re: PETITION TO ESTABLISH TRUST

COUNSEL:

WILLIE ANDREW MANN TRUST

(TRU)...

CHAUNCEY MANN II

(PET)...JACK B. OSBORN

OASIS INVESTMENT PROPERTIES

(TP )...ANDERSON,MCPHARLIN & C

LANDWOOD TITLE COMPANY

(PRENOVOST NORMANDIN BERGH

F.M. TARBELL CO

(PRENOVOST NORMANDIN BERGH

FIRST AMERICAN TITLE INSURANCE

(MARK H MCGUIRE)

MENNIE MANN

(PRO/PER)

Currently under review by Legal Research.

(LR)

Continued matter. Notice not re-reviewed.

(ww)

Future hearing:

03/13/18 Court trial

03/14/18 Court trial

03/15/18 Court trial

03/16/18 Court trial

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: 03/12/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO DS1000636

CASE NAME: MICHAEL WARREN WATKINS

HEARING: re Final Discharge

COUNSEL:

KATHY WATKINS (PET)...BROWN WHITE & NEWHOUSE LLP  
MICHAEL WARREN WATKINS (DEC)...  
AMERICAN CONTRACTORS INDEMNITY (TP )...PRO/PER  
STATE OF CALIFORNIA FRANCHISE TAX BOARD (PRO/PER)  
BERNARD M BIDART

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge by Public Guardian

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

1. First and Final Account was approved on 03/06/17. Need Order Settling First and Final account.
2. Need receipts from Kathy Watkins, Brittney Watkins, Michaela Watkins, and Shannon Watkins.
3. Need Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION:

Inquire status.

(cs)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 03/12/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1200234

CASE NAME: MURDO MACKAY

HEARING:  
Accounting Review

COUNSEL:

JOHN H SCARLATELLA JR	(PET)...	MICHAEL D FINLEY
MURDO MACKAY	(DEC)...	
LAWRENCE A DEAN II	(PET)...	SHERRI L KASTILAHN
DIANE K HADDOCK	(PET)...	PHILIP M SAVAGE
DIANE HADDOCK	(PET)...	JASON R FAIR
DEPARTMENT OF HEALTH CARE SERVICES	(TP )...	PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review/Status by Diane Haddock

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

1. Letters Testamentary issued to Diane Haddock, daughter, on 05/09/12, full authority, no bond.
2. Previous status report approved on 03/06/17.
3. Need to file accounting or further status report.

RECOMMENDATION:

Inquire status.  
(cs)



Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 03/12/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1500025

CASE NAME: YOKE YING TAN

HEARING: Probate status report filed.

COUNSEL:

JASON VIEGAS	(PET)...MITCHELL I ROTH
YOKE YING TAN	(DEC)...
JONATHEN VIEGAS	(OBJ)...RICHARD W.S. PERSHING

GENERAL INFORMATION:

**Continued from 01/10/18. Counsel states the jewelry still needs to be appraised. A Stipulation and Order re the buy out to be submitted.**

THIS CASE IS SET FOR HEARING ON Status Report of Administration by Jason Viegas, administrator/son

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

1. Letters of Administration with full authority issued to Jason Viegas 06/28/16, with \$218,000 bond.
2. Petitioner alleges the estate is not in a condition to be closed as administrator Jason Viegas is awaiting the final inventory of assets from the probate referee.
3. Petitioner requests an additional 6 months to close the estate.
4. Need stipulation and order re buy out as directed by court on 01/10/18.
5. ~Proposed Order: 01/10/18

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **05/28/18**.  
(lh/cs)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 03/12/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600595

CASE NAME: VICTOR HUGO VASQUEZ

HEARING:  
Accounting Review

COUNSEL:  
VICTOR HUGO VASQUEZ JR (PET)...PRO/PER  
VICTOR HUGO VASQUEZ (DEC)...  
GREAT AMERICAN INSURANCE (TP )...PRO/PER

#### GENERAL INFORMATION

Continued from **11/01/17**. No appearance, nor has an accounting been filed.  
**Continued from 12/10/17. I & A was just given to the probate referee.**

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 Victor Vasquez, Jr., son, on 10/25/16; full authority, \$140,000 bond.
1. Final Inventory and Appraisal filed 02/13/18; however, Section 5 is incomplete. Need property tax certificate.
2. **Need** accounting or status report.

#### RECOMMENDATION

Inquire status of accounting. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq. (ww/lh/cs)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 03/12/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700234

CASE NAME: THE JOANNA SABLE REVOCABLE TRUST  
HEARING: OSC re: FTA/FAILURE TO FILE AN ACCOUNTING filed by THE  
NATIONALHUMANE EDUCATION SOCIETY

COUNSEL:

NATIONALHUMANE EDUCATION SOCIETY (PET)...HOLSTROM BLOCK & PAR  
THE JOANNA SABLE REVOCABLE TRUST (TRU)...  
DAVID M. WILSON (STE)...PRO/PER

GENERAL INFORMATION:

Continued from **07/17/17**. Citation not served. Court re-issues citation as to Eerin Shumway. Notice to be given by Attorney Craig Weinstein.

Continued from **09/25/17** On miscellaneous Petition For Probate of the National Humane Education Society order to show cause hearing held (Probate). Court re-issues the citation as to Eerin Shumway for their failure to appear/file an accounting as ordered by the court. Citation issued

Continued from **11/06/17** It appears the citation was never issued from the clerk's office. Citation issued to Eerin Shumway.

**Continued from 12/18/17 On miscellaneous petition for probate of the National Humane Education Society OSC hearing held. Non appearance by EerinShumway, nor has the return of citation been submitted. Citation issues Eerin Shumway, who is cited and required to appear on 03/12/18 and show cause why FTA/Failure to file an accounting.**

THIS CASE IS SET FOR HEARING ON OSC re FTA/Failure to File Accounting

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

1. Matter set at 05/22/17 hearing, wherein, the Court removed Eerin Shumway as trustee and appointed David Wilson as Successor Trustee.
2. Citation reissued as to Eerin Shumway who has failed to appear or file and accounting as ordered by the court.
3. Proof of unsuccessful service of citation filed 02/20/18.

RECOMMENDATION:

Court's discretion.

(nb/cs/ww/cs)

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: 03/12/18      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS1700095

CASE NAME: Therese Magdi Ghandour

HEARING: Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of MARY DAOUD

COUNSEL:

MARY DAOUD

(CPE)...PRO/PER

THERESE MAGDI GHANDOUR

(CTP)...CRAIG M PARKER

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Petitioner, Mary Daoud, appointed conservator of the person on 08/07/17.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 01/24/18; however, section 5 is incomplete as to service of order. **Need** completed notice.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 filed 01/24/18.
4. Care Plan filed 01/24/18

#### RECOMMENDATION

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

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

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DATE: 03/12/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO DS1000767

CASE NAME: MARILYNN SCHULER

HEARING:

Accounting Review

COUNSEL:

RUTH L. HENRICKS

(PET)...HARTNELL LAW GROUP

MARILYNN SCHULER

(DEC)...

STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP )...PRO/PER

GENERAL INFORMATION:

**Continued from 12/18/17.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 5<sup>th</sup> Status Report of Ruth Henricks, administrator, approved on 12/12/16.
2. **Need** accounting or updated status report.

RECOMMENDATION:

Inquire status of accounting.

(cs/ww)

Superior Court of Calif, County of San Bernardino

Page: 2

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

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DATE: 03/12/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1300758

CASE NAME: MTR OF LOUISE MERCEDES BORQUEZ

HEARING:

Hearing Re: RECEIPT OF ORDER

COUNSEL:

DARLENE L PARRIS (PET)...PRO/PER  
LOUISE MERCEDES BORQUEZ (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Receipt of Order

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

1. Hearing set by Court on 12/18/17 as First and Final Account was approved.
2. **Need** Order on First and Final Account submitted.

#### RECOMMENDATION

Inquire status of order.

(ww)

Future Hearing: 3/21/18: Petition for Final Distribution, Account & Report

Superior Court of Calif, County of San Bernardino

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

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DATE: 03/12/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1501070

CASE NAME: RICHARD L SAMPSON

HEARING:

Probate status report filed.

COUNSEL:

WILLIAM SAMPSON (PET)...PARRY & PFAU  
RICHARD L SAMPSON (DEC)...

GENERAL INFORMATION:

**Continued from 12/18/17.**

THIS CASE IS SET FOR HEARING ON Status Report

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

1. Letters of Administration issued to William Sampson, bother/sole heir, on 01/12/16, full authority, no bond.
2. Previous status report approved on 08/17/17.
3. Petitioner alleges the estate is not in a condition to be closed as residential property is currently in escrow and estimated to close within the next 30 days.
4. Petitioner indicates boat and trailer not valued in the Inventory and Appraisal filed 03/01/17 as they both had little or no value in their condition. Petitioner has donated both to charity. **JTD**
5. Petitioner requests an additional 3 months to close the estate.
6. Final Inventory and Appraisal filed 03/01/17.
7. Notice given.
8. ~Proposed order: 11/28/17

RECOMMENDATION:

Matter appears to be moot as Final Report of Waiver of Account is set on **04/05/18**. Court's discretion.

(CS/WW)

Future Hearing: 4/05/18: Final Report of Wavier of Account

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

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DATE: 03/12/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600079

CASE NAME: ESTATE OF WALTER L BUDD AMMONS

HEARING:

Waiver of Account and Report of LARRY AMMONS, KRISTA WAGNER and  
Petition for allowance of fees filed.

COUNSEL:

LARRY AMMONS	(PET)...ALAN D KHALFIN
WALTER L AMMONS	(DEC)...
KRISTA WAGNER	(PET)...ALAN D KHALFIN
S.B. COUNTY PUBLIC	(PET)...CRAIG M PARKER
GARY AMMONS	(OBJ)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by Larry Ammons & Krista Wagner, son and granddaughter/ co-administrators

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

1. Assets on Hand \$166,602.12 consisting of cash.
2. Both petitioners waive statutory compensation.
3. Attorney requests statutory fees of \$6,300.00. (Fee is reduced from \$7,000.00 due to partial fee of \$700.00 to be paid to Craig Parker) Calculated. **See note 6.**
4. Attorney requests extraordinary fees of \$2,207.50 for services rendered in connection with sale of real property. Billed at \$175.00/hour for 7.90 hours of paralegal time and \$375.00/hour of attorney time for a total of 10.1 hours combined. Itemized. [LF pgs 14-15] Also itemized in separate declaration filed 11/17/17. [Dec. LF pgs. 4-5]
  - a. \$175.00/hour in paralegal fees is above the community standard of \$150.00/hour. Does Court wish to allow full amount of \$1,382.50 of paralegal fees or reduce amount to \$1,185 at 7.90 hours at \$150.00/hour? **JTD**
5. Petitioner requests to pay \$700.00 to the San Bernardino County Public Administrator per Order on First and Final Account filed 03/28/17. **JTD**
6. Petitioner requests to pay \$700.00 to the Attorney Craig Parker per Order on First and Final Account filed 03/28/17. **JTD**



7. Petitioner requests authority to withhold \$1,500.00 as a reserve for closing costs.  
**JTD**
8. Notice given.
9. No proposed order. Submit order after hearing.

RECOMMENDATION

Court's discretion. If approved, set hearing re receipts and final discharge for **03/18/19**.

(ww)

Future Hearing: 4/03/18: Hearing Re: Final Discharge *for Public Administrator*

Superior Court of Calif, County of San Bernardino

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

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DATE: 03/12/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600198

CASE NAME: MTR OF MAUD I HARRIS

**SEE ALSO 10 10A**

HEARING:

Probate status report filed.

COUNSEL:

MAUD I HARRIS	(DEC)...
DEBORAH DEXTER-MENDEZ	(PET)...HARTNELL LAW GROUP
JOSEPH J FONDY	(TP )...PRO/PER

**XREF: SPRSS06988** *EST OF MADELINE M DEXTER*

#### 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 Deborah Dexter-Mendez, niece, on 04/20/17; full authority, no bond.
2. Previous status report approved on 09/11/17.
3. **Need** Final Inventory and Appraisal
4. **Need** accounting or status report.

#### RECOMMENDATION

Inquire status of accounting and Final Inventory and Appraisal.

(ww)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 03/12/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700007

CASE NAME: MTR OF JOSEPH WILLIAM SCHLAGER

HEARING:

Petition for final Distribution on Waiver of Account and Report  
of KATHY VALERIE ACOSTA and Petition for allowance of fees filed.

COUNSEL:

KATHY VALERIE ACOSTA (PET)...T W RONALD DANIERI  
JOSEPH WILLIAM SCHLAGER (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of  
Account and for Fees by Kathy Acosta, daughter/administrator with will annexed

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

1. Assets on Hand: \$341,442.60 consisting of \$334,442.60 in cash and remaining is a 2005 Honda CRV.
2. All beneficiaries waive the accounting.
3. Petitioner waives statutory compensation.
4. Attorney requests statutory fees of \$9,894.52. Calculated. [LF pg. 7]
5. Throughout the report the administrator with will annexed is indicated incorrectly as executor. **JTD**
6. Need Notice of Proposed Action(s) for sale of the stocks. **(Supp. 03/01/18 indicates that the stocks were sold on an established stock exchange by Charles Schwab and per Pr.C. § 10537(b)(1) that a Notice of Proposed Action is not required.)**
7. Notice given.
8. Proposed Order: 03/02/18, need statement re notice per Pr.C. § 9202.

RECOMMENDATION

Court's discretion. If approved, set hearing re receipts and final discharge for **03/18/19**.  
(ww)

Superior Court of Calif, County of San Bernardino

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

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DATE: 03/12/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700227

CASE NAME: MTR OF NICHOLAS F KFOURY

HEARING:

Report Sale and Petition for Order Confirming Sale of Real Property.

COUNSEL:

STEPHEN KFOURY (PET)...DARLYNN MORGAN  
NICHOLAS F KFOURY (DEC)...  
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP )...PRO/PER

Address: 13383 Daffodil Lane, Yucaipa, CA 92399 APN: 1242-131-23-0-000

Appraised Value: \$310,000.00

Sale price: \$247,500.00

First overbid: \$260,375.00

Deposit: **\$24,750.00 per Supp. 03/05/18. Sufficient.**

Commission: 5% total commission. \$12,375.00 to Brett Dalbeth of iPro Real Estate.

Additional bond: None.

Petitioner states that current bond of \$20,000.00 is sufficient; however, as there is no request to place funds into blocked account, the Court may wish to increase the bond to amount of cash that will be received from sale as petitioner only has limited IAEA. JTD **(Supp. 03/05/18 requests that proceeds from sale, less \$20,000 to be placed in estate checking account for administrative costs, be placed in blocked account.) Proposed order to deposit money into blocked account received on 03/05/18. JTD**

Reason for Sale: Necessary to pay debts, expenses of administration, taxes and best interest of the interested persons.

Exposure to Market: MLS (Multiple Listing Service), open houses, marketing, advertising, signage

Notice: Notice of Hearing filed 01/30/18.

Proof of Publication notice per Pr.C. § 10300 filed 02/13/18.

~Proposed Form Order: 03/05/18

(ww)

Future Hearing: 8/13/18: 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: 03/12/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1700847

CASE NAME: NANCY LEE SEXTON AKA NANCY L. SEXTON

**SEE ALSO 9**

HEARING:

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

COUNSEL:

MARK LAROE SEXTON (PET)...PRO/PER  
NANCY LEE SEXTON (DEC)...

GENERAL INFORMATION:

Continued from **11/22/17**. Publication gives insufficient notice. Matter continued to republish. Mark Laroe Sexton appointed Special Administrator with limited authority. Special Administrator is authorized to marshal, protect, administer real property and have Probate Referee appraise property and list for sale. Order to be filed.

**Continued from 02/07/18. Better copy of proof of publication to be filed.**

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Mark Sexton, son

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

1. Both heirs waive bond. Estimated value of assets is \$89,000, of which \$1,000 is cash and remaining is 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). **JTD**
2. ~Proposed form Order: 08/23/17

RECOMMENDATION:

RFA .Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **05/20/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh/ww)

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

-----  
DATE: 03/12/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700847

CASE NAME: NANCY LEE SEXTON AKA NANCY L. SEXTON

**SEE ALSO 8**

HEARING: Report Sale and Petition for Order Confirming Sale of Real Property.

COUNSEL:

MARK LAROE SEXTON (PET)...PRO/PER  
NANCY LEE SEXTON (DEC)...

Address: 15150 Lime Street, Hesperia, Ca APN: 0409-082-13-0-000

Appraised value: \$190,000 per Final I&A filed 12/08/17

Sale price: \$210,000

First overbid: \$211,500. However, sections #10(c)-10(d) and #11 are incorrect per Pr. C. 10311(a)(1). **Need recalculation of formula indicating correct overbid amount of \$221,000.00.**

Deposit: \$2,000; **however, does not meet minimum deposit of 10% totaling \$19,000.**

Commission: 6% = \$11,400 split evenly between buyer and seller agents.

Additional bond: Petitioner requests proceeds to be placed in blocked account.

Reason for sale: Necessary to pay debts and expenses of administration

Exposure to market: Agent advertised property on MLS for 14 days and listed on multiple databases.

Notice: Completed; however, Notice of Hearing does not indicate the moving document title of "Report of Sale..." and instead specifies "Notice of Hearing." **JTD**

~Proposed Order: 12/26/17  
(ww)

Superior Court of Calif, County of San Bernardino

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

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DATE: 03/12/18 TIME: 8:30 DEPT: S37P  
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CASE#: SPR SS06988

CASE NAME: EST OF MADELINE M DEXTER

**SEE ALSO 5 10A**

HEARING:

Probate status report filed.

COUNSEL:

DEBORAH L DEXTER	(PET)...BRYAN C. HARTNELL
MADELINE M DEXTER	(DEC)...
KLARISSE DEXTER	(PET)...ROBERT E KNUDSEN
CYNTHIA BURGESS	(PET)...ROBERT E KNUDSEN
JOSEPH J FONDY	(TP )...PRO/PER

**XREF: PROPS1600198** *MTR OF MAUD I HARRIS*

GENERAL INFORMATION:

**Continued from 04/10/17 and 07/03/17 at request of petitioner to file accounting.**

THIS CASE IS SET FOR HEARING ON Probate status report filed s/b Accounting Review

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

1. 8<sup>th</sup> Status Report by Deborah Dexter; executor/daughter, approved on 09/27/16.
2. **Need** accounting or updated status report.

RECOMMENDATION:

Inquire status.

(nb/ww)



Superior Court of Calif, County of San Bernardino  
Page: 10A add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 03/12/18 TIME: 8:30 DEPT: S37P  
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CASE#: SPR SS06988

CASE NAME: EST OF MADELINE M DEXTER

**SEE ALSO 5 10**

HEARING:

Readiness Calendar

COUNSEL:

DEBORAH L DEXTER	(PET)...BRYAN C. HARTNELL
MADELINE M DEXTER	(DEC)...
KLARISSE DEXTER	(PET)...ROBERT E KNUDSEN
CYNTHIA BURGESS	(PET)...ROBERT E KNUDSEN
JOSEPH J FONDY	(TP )...PRO/PER

**XREF: PROPS1600198** *MTR OF MAUD I HARRIS*

No Notes-Readiness. JTD.

(ww)

Superior Court of Calif, County of San Bernardino  
Page: 10B add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 03/12/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800139

CASE NAME: John W McCormick

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

COUNSEL:  
JENNY LYNN DEAN (PET)...ELISABETH KEMPE-OLINGER  
JOHN W MCCORMICK (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Jenny Lynn Dean, executor/friend

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

1. Bond requested in the amount of \$105,000.00 Ok. Net value of the estate consists of \$104,123.88 of which \$19,500.00 is personal property.
2. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b) and Pr.C. § 8571 as petitioner is a non-resident.
3. Notice to Petition to Administer Estate and proof of service filed 02/23/18; however, notice was not sent to the Attorney General as a charity is listed in the will. The charity will not be inheriting from the will as the first to inherit the whole of the estate is still living. Does Court wish for a notice to be sent to the Attorney General? **JTD**
4. **Need** proof of publication.
5. ~Proposed Form Order: 02/13/18

#### RECOMMENDATION

Need to clear note 4.\$105,000.00 bond. If approved, set Accounting/Status Review for **05/20/19**. 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: TARA REILLY

-----  
DATE: 03/12/18 TIME: 8:35 DEPT: S37P  
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CASE#: PRO PS0700988

CASE NAME: SALLY FORLANO TRUST

HEARING:

Seventh Account and Report of LINDA MAXWELL and Petition for allowance of fees filed.

COUNSEL:

LILLIAN ROSALES	(PET)...JENNIFER L FIELD
SALLY FORLANO FAMILY TRUST	(DEC)...
ANGELICA MARIA FORLANO	(MIN/PET)...
GABRIELLE ELIZABETH FORLANO	(MIN/PET)...
DONNASUE SMITH ORTIZ	(PET)...
LINDA MAXWELL	(PET)...ELISABETH KEMPE-OLINGE
ELIZABETH ENRIQUEZ	(STE)...HARTNELL LISTER & MOORE

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 7<sup>th</sup> Account Current, Petition for Fees, Confirmation of Bond by Linda Maxwell, PPF/successor trustee

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

1. Account period covers: 05/01/16-09/30/17
2. Assets on hand \$159,855.50 (estimated market value of \$290,267.95) consisting of \$19,167.54 in cash and the balance in securities.
3. Declaration by Elizabeth Kempe-Olinger filed 11/29/17 indicates that \$616.00 is also held in her Attorney/Client Trust Account.
4. Current bond: \$2000,000.00. Sufficient.
5. Petitioner, Linda Maxwell, requests fees billed at varying rates depending on the level of service required at \$65-125/hour.
  - a. \$4,244.00 for a total of 36.4 hours for services benefiting the trust and both beneficiaries Itemized [LF pgs.16-19].
6. Attorney, Elisabeth Kempe-Olinger, requests fees of \$2,472.00 billed for attorney at \$340/hour and paralegal at \$100/hour for 10.8 hours. Itemized [LF pgs. 20-23].
7. Notice given.
8. ~Proposed order: 11/29/17

RECOMMENDATION:

Court's discretion. If approved, set hearing re next Accounting Review for **01/28/19**.  
Accounting to be filed 30 days in advance.

(ww)

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

-----  
DATE: 03/12/18 TIME: 8:35 DEPT: S37P  
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CASE#: PRO PS1700689

CASE NAME: MTR OF YSB-61325 IRREVOCABLE TRUST

**SEE ALSO 13**

HEARING:

Motion Re: to Compel deposition of petitioner mildred kanter;  
memorandum of pts and auth Filed by Petitioner DENISE KANTER

COUNSEL:

MILDRED KANTER (PET)...FRIDLEY LAW FIRM  
YSB-61325 IRREVOCABLE TRUST (TRU)...  
DENISE KANTER (OBJ)...DOUGLAS J PETTIBONE

Currently under review by Legal Research

LR

(ww)

Future hearing dates: 04/18/18 Probate Status Report by Objector Denise Kanter x 2.

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

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DATE: 03/12/18 TIME: 8:35 DEPT: S37P  
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CASE#: PRO PS1700689

CASE NAME: MTR OF YSB-61325 IRREVOCABLE TRUST

**SEE ALSO 12**

HEARING:

Petition for ORDER SETTING ASIDE REAL PROPERTY CONVEYANCE

COUNSEL:

MILDRED KANTER (PET)...FRIDLEY LAW FIRM  
YSB-61325 IRREVOCABLE TRUST (TRU)...  
DENISE KANTER (OBJ)...DOUGLAS J PETTIBONE

Currently under review by Legal Research

LR

NOTICE:

30 days' notice filed, including personal service to Denise Kanter.

(ww)

Future hearing dates: 04/18/18 Probate Status Report by Objector Denise Kanter x 2.

Superior Court of Calif, County of San Bernardino

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

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DATE: 03/12/18 TIME: 8:35 DEPT: S37P  
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CASE#: PRO PS1700880

CASE NAME: THE MALLINGER FAMILY TRUST

HEARING:

Petition for ORDER APPOINTING SUCCESSOR CO TRUSTEE

COUNSEL:

RICHARD COCKRUM (PET)...FULLERTON LEMANN SCHAEFER & DO  
THE MALLINGER FAMILY TRUST (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: TARA REILLY

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DATE: 03/12/18 TIME: 8:35 DEPT: S37P  
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CASE#: PRO PS1701170

CASE NAME: THE MAYNARD G & PHYLLIS L THOMPSON TRUST

HEARING:

Petition for to Modify Trust; Memorandum of Points & Authorities

COUNSEL:

PHYLLIS THOMPSON  
MAYNARD G AND PHYLLIS L THOMPSON

(PET)...DENNIS M SANDOVAL  
(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: TARA REILLY

**CONSERVATORSHIPS**

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DATE: 03/12/18      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1300123

CASE NAME: RAMON URIEL TORRES

HEARING:

Hearing re Final Discharge

COUNSEL:

CHRISTINA TORRES

(CP )...JAVAHERI & YAHOUDAI

CHRISTINA TORRES

(CPE)...JAVAHERI & YAHOUDAI

RAMON URIEL TORRES

(CEE/CEP)...MATTHEW E. SHEASBY

Waiver of Court Fees and Costs filed by RAMON URIEL TORRES is GRANTED

#### GENERAL INFORMATION

**Continued from 03/22/17.**

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account of estate approved on 03/16/16. Conservatorship of person remains.
  - a. **Need** order signed. ~**Proposed Order: 03/10/16.**
  - b. **Need** amended letters submitted reflecting person only for Christina Torres.
2. **Need** receipt for Trustee of SNT, Herbert Thomas for CPT.
3. **Need** Ex Parte Petition for Final Discharge and Order.
4. Notice of no report of Court Investigator filed 06/10/16.

#### RECOMMENDATION

Inquire status.

(lc/ww)

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

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DATE: 03/12/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1500275

CASE NAME: Kanwaljit K. Dua

HEARING:

SUMMARY Account and Report of RAVIA K. TEJ and Petition for allowance of fees filed.

COUNSEL:

RAVIA K. TEJ (PET)...BRINDA GANDHI  
KANWALJIT K DUA (CTP/PET)...ARUNA RODRIGO

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON SUMMARY Account and Report of RAVIA K. TEJ and Petition for allowance of fees

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

- 1 The accounting is missing the petition for approval of account and prayer. **Need** amended accounting to include the summary of sales, purchases, changes in form of assets, transactions during accounting, unusual items-explanation, request or waiver of compensation by petitioner and attorney
- 2 Accounting period: 05/24/16 – 09/06/17. Conservator was appointed on 04/07/16. **Need** amended accounting beginning with date of appointment of **04/07/16**.
- 3 Assets on hand: \$469,061.45 in cash (**Supp 12/18/17 Petitioner indicates that the money is held jointly with spouse and that conservatee holds a ½ interest.**)
  - a. Ending date of bank statement for account 7640 indicates that cash assets on hand total \$353,493.83. **Need** verified supplement as the assets on hand in petition do not match the provided end period bank statement.
  - b. As Pr.C. §3051(b)(2) provides that community property is not part of the conservatorship estate, **need** clarification as to whether real property shown on Inventory is community property as the supplement filed 12/18/17 indicates that the conservatee doesn't have any separate property.
  - c. Financial institution accounts must be in the name of the Ravia Tej as conservator of the estate of Kanwaljit Dua per Local Rule 20-1406 (g). Does Court wish for a separate account for the conservatee be opened as it cannot be determined from the statements if certain purchases are for the spouse or conservatee? **JTD**

- 4 Bond set at \$20,000. Insufficient. Suggest bond be set at \$268,424.99 which includes recovery *if* amount of assets on hand is correct in note 3. Amount is based on ½ ownership of assets on hand in the amount of \$234,530.72. **JTD**
- 5 Schedule A does not include conservatee's social security income. Need verified supplement clarifying monthly amount of social security received. **(Supp 12/18/17 \$711.00 is received monthly and deposited into BofA acct 7640.)**
- 6 Receipts and disbursements do not seem to balance **need** corrected Summary of Account and supporting schedules.
- 7 Need verified supplement clarifying payments made to Chugh Law Firm. **(Supp 12/18/17 \$8,723.08 has been paid as of Sept. 2017)**
- 8 It appears that both the petitioner and attorney are not seeking compensation.
- 9 Notice given.
- 10 No proposed Order. Submit after hearing.

RECOMMENDATION:

This accounting does not appear to be a true and complete accounting 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. Need proper, amended account per Pr. C. § 1060 et seq. to be set on first check calendar no sooner than **05/28/18**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.

(cs/ww)

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

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DATE: 03/12/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700329

CASE NAME: MTR OF ERIK JOSEPH HERNANDEZ

HEARING:  
Petition for Appointment of Conservator

COUNSEL:

FELIX MENDEZ HERNANDEZ (CP)...PEXTON LAW, APC  
LESLEE HERNANDEZ (CP)...PEXTON LAW, APC  
ERIK JOSEPH HERNANDEZ (CTP)...JENNIFER M DANIEL

GENERAL INFORMATION

Felix and LesLee appointed as temporary co-conservators of the person only on 09/06/17.  
Jennifer Daniel appointed as counsel for Erik.

Continued from **10/16/17** at request of counsel to clear probate notes.

**Continued from 12/18/17 Counsel reports waivers and proof of completion of conservatorship class will be filed today. The Court requests IRC provide a report for the court.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Felix and LesLee Hernandez, parents

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

1. Proposed conservatee is developmentally disabled. **Need** IRC report.
2. Proposed conservatee is developmentally disabled. Capacity Declaration filed 08/30/17.
3. Petitioners request powers under Pr. C. §2351.5 but did not provide attachment 1h specifying powers, and did not complete item 1j of petition re orders limiting civil rights. **Need** verified supplement.
4. Section 11 of the petition fails to like the relationship to the proposed conservatee; however, the List of Required Contacts does except for Vanessa Hernandez. Court may wish to clarify her relationship. **JTD**
5. Certificates of Completion of the Conservatorship Training Class filed 10/18/17 and 12/18/17 for LesLee.
6. Proposed conservatee is developmentally disabled. Report of Counsel Jennifer Daniel filed 10/16/17.
7. CI report filed 10/11/17.

8. **Need** return of Citation.
9. **Need** Certificate of Completion of the Conservatorship Training Class for Felix Hernandez.
10. **Need** Notice of Hearing and Proof of Service on Vanessa Hernandez as she did not sign a waiver of notice.
11. Waivers of notice of all filings and proceedings filed by Felix and Leslee Hernandez (parents); Savannah and Hailee (siblings); and Marion and Charlotte (grandparents)
12. ~Proposed Form Order: 08/30/17

#### RECOMMENDATION

Need IRC report to clear notes 3 and 8-10. 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/nb/cs/ww)