



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 03/19/18

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.

(02/27/18 & 03/14/18 ww) (03/01/18 & 03/13/18 cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Civil
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CIVIL**

DATE: 03/19/18 TIME: 8:30 DEPT: S35P

CASE#: CIV DS1722271

CASE NAME: TUMANG VS BEAUMONT

HEARING:

Hearing Re: STATUS OF SERVICE

COUNSEL:

MIMOSA TIU TUMANG (PLA)...ZIPRICK & CRAMER
BARBARA A BEAUMONT (DEF)...
ROBERT WILLIAM HAVEY
DEBRA M RAYNOR
NANCY HAVEY
ALL PERSONS UNKNOWN, CLAIMING

No documents in *probate* civil folder. No notes – JTD

(ww)

Future Hearing: 5/09/18: Trial Setting Conference

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: 03/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600193

VACATED

CASE NAME: MARILYN DOSKOCIL

HEARING:

Hearing Re: TRIAL SETTING CONFERENCE

COUNSEL:

NORMAN GIEBELER (PET)...LAW & STEIN

MARILYN DOSKOCIL (DEC)...

AUCTION-CA FINANCIAL SRVS (TP)...

Future hearing dates: 04/18/18 Status Conference

(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: 03/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700121

CASE NAME: JANET M MCELHOE

HEARING:

FIRST AND FINAL Account and Report of PAUL MCELHOE and Petition
for allowance of fees filed.

COUNSEL:

PAUL MCELHOE (PET)...RODRIGO LAW FIRM
JANET M MCELHOE (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final and Waiver of Account and
Petition for Fees, Reimbursement for costs advanced and for Final Distribution by Paul
Mcelhoe, brother/sole heir

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

- 1 Assets on hand: \$488,979.88 in cash.
- 2 Petitioner is sole heir and waives accounting.
- 3 Petitioner waives statutory commissions.
- 4 Attorney requests statutory fees of \$12,779.42. Calculated.
- 5 Attorney requests reimbursement for advanced costs in the amount of \$51.00.
Generally described. [LF pg. 5]. **JTD**
- 6 Bank statement provided for period of 04/06/17-05/03/17 for Chase account # 6995
filed 03/08/18; however, **need** statement that includes the date of death of 01/19/17
in support of Final Inventory and Appraisal per Local Rule 20-908.
- 7 ~Proposed Order: 12/11/17

RECOMMENDATION:

Need to clear note 6 then Court's discretion. If approved, Court to set hearing on filing of
receipts and final discharge for **03/25/19**.

(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: 03/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700411

CASE NAME: DON BENNETT

HEARING:

First and Final Account and Report of BENITA CROOK and Petition
for allowance of fees filed.

COUNSEL:

BENITA CROOK (PET)...GAUDY LAW, INC
DON BENNETT (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Waiver of Account; Petition for
Final Distribution; and Petition for Fees by Benita Crook, daughter/sole heir

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

- 8 Assets on hand: \$139,777.04 in cash.
- 9 Petitioner is sole heir and waives accounting.
- 10 Petitioner waives statutory commissions.
- 11 Attorney requests statutory fees of \$5,500.00. Calculated.
- 12 Attorney requests reimbursement for advanced costs in the amount of \$2,107.60
and \$465.00 for filing of this petition. Itemized. [LF pg. 16]
- 13 Petitioner requests a reserve of \$465.00 to cover the final filing fee. **JTD**
- 14 No proposed order.

RECOMMENDATION:

Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge
for **03/25/19**.

(ww)

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

DATE: 03/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700463

CASE NAME: MTR OF ROBERT WARREN HAVEY

SEE ALSO 6 7

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$500.00 ON ROBERT HAVEY

COUNSEL:

BARBARA A BEAUMONT (PET)...ALBREKTSON & SHUMATE, LLP
ROBERT WARREN HAVEY (DEC)...

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON OSC Re Sanctions Of \$500.00 On Robert Havey

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

1. Matter set on 01/11/18 for failure to appear and Court ordered Robert Havey to be personally present on 03/19/17.
2. Declaration of Robert Havey filed 01/30/18 indicates he is willing to sign over the interest in the easement to Mrs. Tumang and his objections are to indicate that the easement does not belong to his father's estate.

RECOMMENDATION:

Court's discretion.

(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: 03/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700463

CASE NAME: MTR OF ROBERT WARREN HAVEY

SEE ALSO 5 7

HEARING:

Hearing Re: OSC RE WAIVER OF OBJECTIONS BY ROBERT HAVEY

COUNSEL:

BARBARA A BEAUMONT

(PET)...ALBREKTSON & SHUMATE, LLP

ROBERT WARREN HAVEY

(DEC)...

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON

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

1. Matter set on 01/11/18 wherein Robert Havey failed to appear and was ordered to be personally present on 03/19/18.
2. Court notes that if he fails to appear, Court will deem the objection of Robert Havey waived permanently.

RECOMMENDATION:

Court's discretion.

(cs)

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

DATE: 03/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700463

CASE NAME: MTR OF ROBERT WARREN HAVEY

SEE ALSO 5 6

HEARING: Petition for LETTERS OF ADMINISTRATION WITH FULL
AUTHORIZATION TO ADMINISTER UNDER IAEA

COUNSEL:

BARBARA A BEAUMONT (PET)...ALBREKTSON & SHUMATE, LLP
ROBERT WARREN HAVEY (DEC)...

GENERAL INFORMATION

Continued from 08/08/17. Counsel indicates a supplemental has been filed and states his client is seeking limited powers due to adjacent property owner seeking a quiet title. Counsel also informs the Court that there is a surviving spouse they have been trying to contact with no luck. Court orders petition to be served and filed by 08/29/17. Robert Harvey ordered to appear in court. Appearance by CourtCall approved.

Continued from **09/05/17 and 11/09/17.**

Continued from 01/11/18 Court sets OSC re sanctions in the amount of 500.00 for failure to appear. Court orders Robert Havey to be personally present on 03/19/18. Court notes if Robert Havey is does not appear, Court will deem objections of Robert Havey waived permanently. OSC re Wavier of Objections set.

THIS CASE SET FOR HEARING ON Petition for **Ancillary** Letters of Administration with full authority under IAEA by Barbara Beaumont, daughter.

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

1. Petitioner seeks no bond; as there will be an adverse possession claim. Estate value is \$1,000 in real property. Alternatively, petitioner requests limited authority.
2. Petitioner appears to be step-daughter; however; **Supp. (08/07/17)** petitioner alleges she is a child under the Family Code §§7630, 7611(d) and Pr. C. § 6453.
3. Spouse appears to have higher priority; however, no objections or competing petitions filed. Petitioner alleges that spouse has not returned any of her phone calls.
4. Second declaration by Robert Harvey, son, filed stating court should not grant this petition as this property is not owned by decedent; was purchased at auction by himself; is not an asset of this estate; and the petitioner has stated that this parcel of land is the only asset in the estate.

5. **Objection filed** in the form of a declaration by **decedent's son, Robert Havey. Supp. (08/07/17) indicates objections deal with title to property and a contested hearing should not be necessary. Alternatively, the Court could limit Petitioner's powers to some extent so that a contested hearing would not be necessary.**
6. **Third declaration/objection filed by Robert Havey on 10/13/17; which appears to be objection to petition for instructions/property easement issues. 4th Declaration filed which appears to be another objections as he is alleged owner of easement.**
7. ~Proposed Form Order: 05/12/17.

RECOMMENDATION;

Matter is contested. Court's discretion re bond. If approved, set Accounting/Status Review for **06/03/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/nb/lc/cs)

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

DATE: 03/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800131
CASE NAME: ALLINE BAZILIUS

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

COUNSEL:

MICHAEL PAUL BAZILIUS (PET)...PRO/PER
ALLINE BAZILIUS (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Limited
Authority under IAEA by Michael Bazilius, son

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

1. Section 2d of petition indicates that bond should not be required but section 3e is incomplete; however, 3e is addressed in an attachment. [LF pg. 6] **JTD**
2. Net value of the estate consists of \$237,231.40 of which \$5,432.40 is personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
3. **Need** Due Diligence Declaration (local form) as to Renee Simmons, granddaughter, as address is indicated as "unknown".
4. **Need** proof of publication
5. Notice to Petition to Administer Estate and proof of service filed 03/08/18; however, section 4a and the date of the server is indicated as **09/13/18**. Court may wish to clarify on record what the correct date of service was. **JTD**
6. ~Proposed Form Order: 02/13/18

RECOMMENDATION

Need to clear notes 3 & 4 then Court's discretion re bond and note 5. If approved, set Accounting/Status Review **06/03/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

DATE: 03/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800133

CASE NAME: JESUS GONZALEZ AKA JOSE DE JESUS GONZALEZ-VILLEGAS

HEARING: Spousal Property Petition hearing.

COUNSEL:

MARIA GONZALEZ RAMIREZ (PET)...JENNIFER L FIELD
JESUS GONZALEZ (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by spouse, Maria Ramirez, Petitioner

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

1. Petitioner, Maria Ramirez, seeks court to determine and confirm her half of community property and determine that decedent's half transfers to petitioner without administration. Specifically, real property located in San Bernardino, CA.
2. Supplement filed 02/09/18 indicates property was acquired during marriage with community funds; however, most recent recorded deed states decedent has title as an unmarried man which is an error as decedent and petitioner never divorced. Supplement indicates a copy of deed is attached; however no attachment provided.
3. Decedent died intestate with eight issue who would also share a two-thirds distribution in the estate per Pr.C. §6401 if the real property is the separate property of decedent.
 - a. Decedent's adult children signed consent.
4. ~Proposed Form Order: 02/16/18

RECOMMENDATION:

Court's discretion.

(cs)

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

DATE: 03/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800120

CASE NAME: MTR OF GLADYS L CRENSHAW

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

COUNSEL:

LILLIAN LEONE (PET)...DIANA J CARLONI
GLADYS L CRENSHAW (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Limited Authority under IAEA by Lillian Leone, sister

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

1. Bond in the amount of \$22,000.00 is being requested. Ok. . The estate consists of \$220,000.00 of which \$20,000.00 is personal property.
2. Notice to Petition to Administer Estate and proof of service filed 02/16/18; however, it appears that there was a clerical error as the department is indicated as S37 instead of S35. **JTD**.
3. Proof of publication filed 02/28/18; however, the department is incorrect as the Notice was incorrect. **See note 2. JTD**
4. ~Proposed Form Order: 02/07/18

RECOMMENDATION

Court's discretion re: notes 2 & 3. \$22,000.00 bond. If approved, set Accounting/Status Review **06/03/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

DATE: 03/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800151

CASE NAME: MTR OF ELIZABETH MUNOZ

HEARING:

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

COUNSEL:

DAVID T MUNOZ (PET)...ANDERSON & LEBLANC, A.P.L.C.
ELIZABETH MUNOZ (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full
Authority under IAEA by David Munoz, spouse

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

1. Will waives bond. The estate value is not indicated. Petitioner indicates that
appointment is necessary to initiate legal proceedings. 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. The will conditionally incorporates decedent's Trust. Copy of Trust is attached.
3. ~Proposed Form Order: 02/16/18

RECOMMENDATION

RFA. Court's discretion re bond. If approved, set Accounting/Status Review for **06/03/19**.
Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of
local rule 20-908.

(ww)

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

DATE: 03/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600412

CASE NAME: ARTHUR G. RUIZ

HEARING: First & Final Account and Report of LAURA DIAZ and Petition for allowance of fees filed.

COUNSEL:

LAURA DIAZ	(PET)...	MATTHEW ALDEN
ARTHUR G. RUIZ	(DEC)...	
ADVANCE INHERITANCE, LLC	(TP)...	JAMES L LEESTMA
AUCTION CA FINANCIAL SRVCS	(PRO/PER)	

GENERAL INFORMATION:

Continued from 02/26/18 for counsel to file supplement to clear probate notes; court orders that any additional supplement to be filed by 03/09/18.

THIS CASE SET FOR HEARING ON First and Final Account and Petition for allowance of Fees, by Laura Diaz, (Administrator/Petitioner)

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

1. Accounting period 11/11/15 to 10/15/17.
2. Assets on Hand \$221,783.47 consisting of \$215,583.47 in cash and \$6,200 in personal property.
3. Current bond set at \$20,000 and all excess funds are in blocked account. Appears sufficient.
4. Statutory fees in the amount of \$7,761.84 requested. Calculated.
5. Distribution as to Leonard Ruiz does not match amounts listed in proposed order. Need verified supplement or alternatively, Court to clarify.
6. Petitioner requests reimbursement of \$23.76 Itemized [Supp. 03/08/18, LFp4-5].
7. Petitioner requests reimbursements of \$3,572.50 be made to Theresa Sierra for estate costs incurred on Petitioner's credit card and two utility payments. Petitioner indicates Theresa Sierra paid off the balance on her credit card so that the estate would not incur any interests and made the utility payments. Itemized [Supp. 03/08/18, LFp3-5].
8. Attorney requests reimbursement of costs advanced of \$621.42. Itemized [Supp. 03/08/18, LFp5].

9. Attorney requests extraordinary fees of \$948.34 for services rendered in connection with the sale of real property. Billed at \$200/hour for a total of 4.9 hours' attorney time. Itemized [Acct 11/02/17, LFp24]. JTD.
10. Petitioner requests to withhold \$1,500 in reserves to cover any closing expenses. JTD
11. ~Proposed Order: 03/08/18

RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **04/08/19**.

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/19/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1701261

CASE NAME: IN RE TRUST OF OFELIA CABRAL

HEARING:

Petition for TO INVALIDATE TRUST POUR-OVER WILL INTER-VIVOS
TRANSFERS OF OFELIA CABRAL BASED ETC

COUNSEL:

OFELIA CABRAL

(PET)...MARK W REGUS

TRUST OF OFELIA CABRAL

(TRU)...

Currently under review by Legal Research

LR

NOTICE:

Need copy of trust filed to determine persons' requiring service.

(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: 03/19/18 TIME: 8:35 DEPT: S35P

CASE#: TRU PS1800030

CASE NAME: The Horace Family Trust

HEARING:

Petition for order determining trust's title to real property

COUNSEL:

ALICIA C ADKINS (PET)...RODRIGO LAW FIRM
THE HORACE FAMILY TRUST (TRU)...

Currently under review by Legal Research

LR

NOTICE:

Notice given.

(ww)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIPS**

DATE: 03/19/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600333

CASE NAME: MTR OF RICHARD MCNUTT

HEARING: Accounting Review by Inland Regional Center

COUNSEL:

INLAND COUNTIES REG CNTR (CE)...LAYNE A BARTHOLOMEW
RICHARD MCNUTT (CEE)...

GENERAL INFORMATION:

Conservatee passed away on 11/13/17.

THIS CASE SET FOR HEARING ON Accounting Review by IRC as to Special Needs Trust

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

1. On 04/17/17, Court approved the amount to fund the SNT at \$67,500 and required bond of \$70,000; first and final account now due.
2. IRC also appointed conservator of the estate on 04/17/17. Suggest court order First and Final accounting for the conservatorship of the estate. JTD

RECOMMENDATION:

Inquire status. Court's discretion re note 2.

(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: 03/19/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600300

CASE NAME: MTR OF RAMON ARGUELLES

SEE ALSO 13B 13C

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ANELY ARGUELLES

COUNSEL:

ANELY ARGUELLES (PCE)...
RAMON ARGUELLES JR (PCE)...PRO/PER
RAMON ARGUELLES (CTP)...MITCHELL I ROTH

GENERAL INFORMATION

Continued from **12/04/17** for conservator to clear notes.

Continued from 02/26/18 Matter is continued and Court sets OSC re Sanctions on the conservators in amount of \$500.00 for failure to appear and OSC re Suspension of powers of conservator for the date of March 19, 2018. Court orders conservators to be personally present in court at 9:30am in Department S35 on March 19, 2018.

THIS CASE SET FOR HEARING ON Compliance Review.

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

- 1 Anely and Ramon Arguelles Jr., parents, appointed as limited co-conservators of the person only on 05/01/17.
- 2 **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
- 3 **Need** Care Plan in accord with Pr.C.§2352.5.
- 4 Notification of Conservatee's rights per Pr.C.§1830(c) filed 05/02/17; however, paternal and maternal grandparents must be noticed also. **Need** completed notice to Maria Vargas & Filomeno Ortiz (maternal grandparents) and Maria & Ramon Arguelles Sr. (paternal grandparents).

RECOMMENDATION

Need to clear notes 2-4.

(ww/cs/ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/19/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600300

CASE NAME: MTR OF RAMON ARGUELLES

SEE ALSO 13A 13C

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$500.00 ON CONSERV ATORS

COUNSEL:

ANELY ARGUELLES	(PCE)...
RAMON ARGUELLES JR	(PCE)...PRO/PER
RAMON ARGUELLES	(CTP)...MITCHELL I ROTH

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON OSC re Sanctions of \$500.00 on Conservators.

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

1. OSC set on 02/26/18 when both conservators did not appear at the Conservatorship Compliance Review hearing.
2. Anely and Ramon Arguelles, Jr., co-conservators/parents, are to be personally present.
3. Court set a sanction of \$500.00 for the conservators.

RECOMMENDATION

Court's discretion re OSC and sanctions.

(ww)

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

DATE: 03/19/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600300

CASE NAME: MTR OF RAMON ARGUELLES

SEE ALSO 13A 13B

HEARING:

Hearing Re: OSC RE SUSPENSION OF POWERS OF CONSERVATORS

COUNSEL:

ANELY ARGUELLES (PCE)...
RAMON ARGUELLES JR (PCE)...PRO/PER
RAMON ARGUELLES (CTP)...MITCHELL I ROTH

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON OSC re Suspension of Powers of Conservators

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

1. OSC set on 02/26/18 when both conservators did not appear at the Conservatorship Compliance Review hearing.
2. Anely and Ramon Arguelles, Jr., co-conservators/parents, are to be personally present.
3. Court has discretion to suspend the co-conservators powers and appoint a replacement conservator.

RECOMMENDATION

Court's discretion re OSC.

(ww)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PUBLIC GUARDIAN

DATE: 03/19/18 TIME: 10:00 DEPT: S35P

CASE#: SC SS00952

CASE NAME: IN THE MATTER OF DAVID PEEK

HEARING:

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

COUNSEL:

DAVID PEEK	(CEP)...MARK J. ANDREW FLORY
WILLIAM PEEK	(SC/CPE)...KELLER & KELLER
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
THE SPECIAL NEEDS TRUST OF DAVID PEEK (TRU)...	
MEDICAL CENTER	(TP)...SUSAN G KOONTZ

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. William Peek, former conservator, was discharged on 06/01/15 per minute order on re: Petition for Instructions. PG was appointed as temporary successor conservator of the person and estate on 01/16/14 then general conservator on 01/27/14.
2. Accounting period 01/27/14 to 03/31/16; however, accounting period start date should begin with date of first appointment of 01/16/14. **JTD**
3. Assets on Hand \$136.49 in cash.
4. Public Guardian requests fees totaling \$4,409.00. Approving and confirming \$4,009.00 will be deferred until such time as the conservatorship estate has sufficient funds for such purpose; approving and confirming \$400.00 which was previously collected by petitioner. Generally itemized. **JTD**
5. County Counsel request fees in the amount of \$2,309.00 Approving and confirming and \$2,109.00 will be deferred until such time as the conservatorship estate has sufficient funds for such purpose; approving and confirming \$200.00 was previously collected by petitioner. Generally itemized. **JTD**
6. Signatures by petitioner and counsel are not dated. [LF pg. 7] **JTD**
7. Notice given.

8. ~Proposed Order 08/29/17

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: 03/19/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS8682

CASE NAME: IN THE MATTER OF HELEN HADLEY

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
HELEN HADLEY	(CEP)...HARTNELL LAW GROUP
OFFICE OF ADMINISTRATIVE HEARINGS (RES)...PRO/PER	
JAMES OLALIA	(MICHAEL B LEVIN)

GENERAL INFORMATION

Terminated on 07/29/16.

Continued from 06/12/17.

THIS CASE SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present 8th Account by approved on 02/01/16.
2. **Need** 9th and final account beginning with date of 11/01/15.

RECOMMENDATION

Inquire status of accounting.

(nb/ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/19/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1300192

CASE NAME: MATTHEW FLOREZ SPECIAL NEEDS TRUST

HEARING:

Petition for accept resignation, trustee and appt. of Successor Trustee

COUNSEL:

MATTHEW FLOREZ

(PET)...PRO/PER

MATTHEW FLOREZ S.N. TRUST

(TRU)...

RAQUEL FLOREZ

(PET/TEE)...JOHN F WEBER

GENERAL INFORMATION

Continued from 03/14/18. Sherri Kastilahn appointed as counsel for Matthew Florez. The Court notes Matthew Florez does not object to the Petition to Accept Resignation of Trustee and Appointment of Public Guardian. The Court advises Matthew Florez, Raquel Florez remains trustee until further order of the Court. Matter referred to the Public Guardian. Matter is trailed to the public guardian calendar on 3/19/18.

THIS CASE IS SET FOR HEARING ON Petition to Accept Resignation of Trustee and Appointment of Public Guardian by Raquel Florez, Trustee

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

1. Petitioner, Raquel Florez, seeks Court approval to resign as Trustee and appoint Public Guardian.
2. Petitioner alleges the Order Establishing Special Needs Trust signed 03/28/13 provides that the Trustee may only resign pursuant to petition and order thereon with the right to nominate a successor trustee.
3. Petitioner alleges the current balance on hand for Trust is \$31,215.27, with a current bond of \$45,000.
4. Notice was given.
5. ~Proposed Order: 12/06/17

RECOMMENDATION

Court's discretion.

(lh/ww)

Future Hearing: 6/26/18: Accounting Review re 4th Acct by Raquel Florez

Superior Court of Calif, County of San Bernardino

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

DATE: 03/19/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS9513

CASE NAME: Nannette Scharry

HEARING:

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

COUNSEL:

PUBLIC GUARDIAN (CTE/CPE/PCR)...COUNTY COUNSEL
NANNETTE SCHARRY (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION:

Letters expire: 01/13/19

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: 11/21/14-02/29/16
2. Assets on Hand: \$11,599.37 of which \$6,599.37 is cash and the rest in Irrevocable Burial Trusts.
3. Public Guardian requests confirmation of fees previously collected by petitioner the amount of \$3,200.00. Generally itemized.
4. County Counsel r requests confirmation of fees previously collected by counsel in the amount of \$1,600.00. Generally itemized.
5. Signatures by petitioner and counsel are not dated. [LF pg. 7] **JTD**
6. Notice given.
7. Proposed Order: 09/21/17 does not match petition as it should request confirmation of fees previously collected by petitioner and counsel.

RECOMMENDATION:

Court's discretion. If approved, set for next Accounting Review in 60 days as second account current is overdue.

(ww)

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

DATE: 03/19/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600306

CASE NAME: MTR OF OLETA RUTH BELANGER

HEARING:

Petition for APPOINTMENT OF THE PUBLIC GUARDIAN AS SUCCESSOR
TRUSTEE

COUNSEL:

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

Currently under review by Legal Research.
(LR)

Notice given.
(ww/cs)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/19/18 TIME: 10:00 DEPT: S35P

CASE#: VC VS00143

CASE NAME: MTR OF NICHOLAS JOSEPH HARRY SMITH

HEARING:

Accounting Review by ***

COUNSEL:

NOREEN SMITH	(PET)...
ELENA ARMSTRONG	(CEP)...PRO/PER
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
NICHOLAS JOSEPH HARRY SMITH	(CEP)...HARTNELL LAW GROUP
NICHOLAS JOSEPH HARRY SMITH SPECIAL (TRU)	...HARTNELL LAW GROUP
INLAND REGIONAL CENTER	(OBJ)...J.S. HERMANSON

GENERAL INFORMATION

Continued from 07/25/16, 02/06/17 and 07/17/17.

THIS CASE IS SET FOR HEARING ON Accounting Review *re SNT*

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

1. 8th **Conservatorship** Account by the PG was approved on 07/20/15.
2. **Need** 9th **Conservatorship** account or waiver of account beginning with date of 09/26/14.

RECOMMENDATION:

Inquire status.

(sa/nb/ww)

Future Hearing: 5/14/18: Accounting Review *re SNT*

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/19/18 TIME: 10:00 DEPT: S35P

CASE#: SC SS00200

CASE NAME: IN THE MATTER OF LATHA TYRONE BOSLEY

HEARING:

Hearing Re: REFERRAL TO PUBLIC GUARDIAN

COUNSEL:

LATHA TYRONE BOSLEY (PLA)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Referral to Public Guardian

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

1. Matter set on Court's own motion on 03/06/18, after receipt and review of Special CI report dated 02/21/18.

RECOMMENDATION

None

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 03/19/18 TIME: 1:30 DEPT: S35P

CASE#: VPR VS003101

CASE NAME: MATTER OF THE MC SPICER TRUST

SEE ALSO 19

HEARING:

Hearing Re: COURT TRIAL (FIRST SESSION)

COUNSEL:

CHARLES KING	(PET)...CALDWELL, KENNEDY & PORTER
MILBRY ATISHA CLEYO SPICER	(PET)...CALDWELL, KENNEDY & PORTER
MILBRY CLEYO SPICER	(DEC)...
RANDOLPH STEWARD	(PET/APP)...
MILBRY CLEYO SPICER TRUST	(TRU)...
RANDECCA C STEWARD	(RES)...PRO/PER

XREF: VPRVS002838 *ESTATE OF MILBRY C SPICER*

No Notes-Court Trial- JTD.

(ww)

Future Hearings: 3/21/18-3/23/18: 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: 03/19/18 TIME: 1:30 DEPT: S35P

CASE#: VPR VS003101

CASE NAME: MATTER OF THE MC SPICER TRUST

SEE ALSO 18

HEARING:

Hearing Re: FIFTH Account and Report of CHARLES KING, MILBRY CLEYO SPICER and Petition for allowance of fees filed.

COUNSEL:

CHARLES KING	(PET)...CALDWELL, KENNEDY & PORTER
MILBRY ATISHA CLEYO SPICER	(PET)...CALDWELL, KENNEDY & PORTER
MILBRY CLEYO SPICER	(DEC)...
RANDOLPH STEWARD	(PET/APP)...
MILBRY CLEYO SPICER TRUST	(TRU)...
RANDECCA C STEWARD	(RES)...PRO/PER

XREF: VPRVS002838 ESTATE OF MILBRY C SPICER

GENERAL INFORMATION

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

Continued from **11/15/17**. Court makes orders re filing of objections and Pretrial Orders. Fifth Account is contested. Trial estimate is two and a half days. Court set exchange deadline for 4PM on 01/24/18.

Continued from **01/24/18**.

Continued from 02/26/18. Matter confirmed for trial by the Court.

THIS CASE SET FOR HEARING ON 5th Account, Petition for Fees and Petition for Leave to Resign and Discharge Pr.C. §§ 15640(d) 17200(b)(1) by Charles King and Milbry Cleyo Spicer, Successor Trustees.

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

1. Accounting period 03/31/13 – 02/29/16.
2. Assets on hand \$3,912.56.
3. Counsel Kennedy request fees of \$8,776.25 for 96.45 hours at \$100/300 per hour for paralegal and attorney service. Itemized [Acct. 03/08LFpg17-21]. JTD
4. Counsel Kennedy requests that a judgment be entered against Randolph Steward for the combined total of \$25,123.75 for additional attorney's fees for filing bad faith petitioner and under the authority of *Rudnick v. Rudnick (2009)* 179 Cal. App. 4th 1328. Itemized [Acct. 03/08 LF pgs. 21-30]. JTD

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

5. Trustees waive compensation.
6. Trustees seek to resign as the trust consists of judgments against the trust. The real property is in tax arrears since 2009 and after fees there will be no assets. Trustees have assigned all interest in all judgments owed to trust.
 - a. **Assignment of Interest filed 11/15/17.**
 - b. Prayer states administration is ongoing. Question who will oversee the judgments if petitioners resign? **Supp. 01/17/18 requests court to appoint public administrator. JTD**
7. Resignations by co-trustees, Charles King and Milbry Cleyo filed 07/05/17.
8. Notice of Appeal Default filed 04/11/16. Order re: Appeal is dismissed placed in file on 03/09/18.
9. Court to see Declaration by Randolph Steward filed 02/23/18.
10. Declaration by Randolph Steward re property taxes filed 07/05/17.
11. Response to Declaration of Randolph Steward by co-trustees, Charles King and Milbry Cleyo, filed 07/05/17.
12. **Notice of Stay with Memorandum and Evidentiary Objections by Randolph Steward filed 12/12/17.**
13. **Objection to Fifth Account and Report by Randolph W Steward filed 12/12/17. Need proof of service.**
14. **Response to Objections to the 4th and 5th Account, Notice of Stay, Memorandum, and Appendix to Exhibits by co-trustees, Charles King and Milbry Cleyo filed 01/03/18.**
15. Proposed order submitted 03/08/17; however, resignation etc is not clear, accounting period is not stated and assets on hand are not stated. Submit order after hearing.

RECOMMENDATION

Matter is contested.

Court's discretion. If approved, set future hearing for Accounting/Status Review on **03/21/18**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

(lc/lh/ww)

Future Hearings: 3/21/18-3/23/18: Court Trial

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

PROBATE

DATE: 03/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400266

CASE NAME: The Darlene Comerford Special Needs Trust

HEARING:

PETITION TO SETTLE THIRD Account and Report of JOLENE VIVEROS
and Petition for allowance of fees filed.

COUNSEL:

JOLENE VIVEROS

(PET)...DENNIS M SANDOVAL

DARLENE COMERFORD SPECIAL TRUST

(TRU)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 3rd Account Current of SNT and Petition for Allowance of Fees by Jolene Viveros, Trustee.

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

1. Accounting period: 12/01/16-11/30/17
2. Assets on hand: \$135,495.61 of which 20,041.14 is cash..
3. Petitioner requests that current bond of \$167,000.00 be decreased by \$17,000.00 to \$150,000.00. Appears that decrease is appropriate per calculation. [LF pg. 3] **JTD**
4. Petitioner waives compensation for services during this period of accounting.
5. Attorney is requesting fees of \$1,732.50 for 8.90 hours at \$225.00/hour for 6.20 hours' attorney time and \$125.00/hour for 2.70 hours' paralegal time. [LF pgs. 18-22]. **JTD**.
6. Attorney is requesting reimbursement of costs advanced in the amount of \$230.00. **JTD**
7. Petitioner requests that the previously authorized \$1,500 allowance to pay for monthly expenses for care to remain. [LF pg. 3] **JTD**
8. Notice given.
9. ~Proposed order: 01/11/18

RECOMMENDATION

Court's discretion. If approved, set Accounting/Status Review for **03/18/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400386

VACATED

CASE NAME: William Arthur Lee

HEARING:

Accounting Review by ***

COUNSEL:

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

(ww)

Future hearing dates: 04/24/18 First and Final Account and Report of Public Administrator
04/24/18 Probate Status Report filed **by Christian Dymally-Lee**

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

DATE: 03/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600124

CASE NAME: MTR OF HELGA MARIE HARDERS

HEARING:

Accounting Review by ***

COUNSEL:

CEASAR A ORTIZ (PET)...PRO/PER
HELGA MARIE HARDERS (DEC)...

GENERAL INFORMATION

Continued from **10/23/17**. Administrator states the property was lost to foreclosure. Matter is continued for a status report to be filed.

Continued from 01/08/18. A letter filed by the administrator regarding the status. Administrator needs to file a petition to terminate the estate for lack of assets.

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 Caesar Ortiz, son, on 08/16/16; full authority, no bond.
2. **Need** final Inventory and Appraisal
3. **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: JAMES MICHAEL WELCH

DATE: 03/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600250

CASE NAME: ELLSWORTH TROMBLEY

HEARING:

Motion Re: NOTICE AND MOTION TO BE RELIEVED AS ATTORNEY OF
RECORD Filed by Petitioner CHRIS BURKHARDT

COUNSEL:

CHRIS BURKHARDT (PET)...CARL LARSON
ELLSWORTH TROMBLEY (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Motion to be Relieved as Counsel by Carl Larson,
attorney for personal representative, Chris Burkhardt.

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

1. Petitioner Carl Larson seeks to be relieved as counsel for Chris Burkhardt,
executor.
2. **Need** mandatory form Declaration [MC-052] in support motion.
3. **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.
4. No Form Order Provided.

RECOMMENDATION

Need to clear notes 2 & 3, then Court's discretion.

(ww)

Future Hearing: 9/17/18: Hearing Re: Final Discharge

Superior Court of Calif, County of San Bernardino

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

DATE: 03/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600454

CASE NAME: MTR OF ALEJANDRA CASTILLO

HEARING:

Accounting Review by ***

COUNSEL:

ELAINE ARIAS MONTES	(PET)...PRO/PER
ALEJANDRA CASTILLO	(DEC)...
DEUTSCHE BANK NATIONAL TRUST	(TP)...WRIGHT, FINLAY & ZAK

GENERAL INFORMATION:

Continued from **10/31/17** and **12/12/17**. No appearances. Notice by Judicial Assistant. Citation issued as to Elaine Arias Montes who is cited and required to appear.

Continued from 01/30/18. The Court orders the Administrator to file a status report by 02/19/18. Elaine Arias Montes is ordered to be present at next hearing.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued to Elaine Montes, daughter, on 06/28/17, full authority, no bond.
2. Proof of personal service of citation filed 01/19/18; however section 2 as to documents served is blank but the service is always of a copy of the citation and the minute order. **JTD**
3. **Need** final inventory and appraisal.
4. **Need** accounting or status report.

RECOMMENDATION:

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

(nb/ww)

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

DATE: 03/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600640

CASE NAME: MTR OF FRED AUSTIN YATES

HEARING:

Accounting Review by ***

COUNSEL:

JAMIE WALDIE	(PET)...	BRYAN NADDAFI
FRED AUSTIN YATES	(DEC)...	
DEPT OF HEALTH CARE SERVICED	(TP)...	

GENERAL INFORMATION:

Continued from **10/24/17**. No appearances. Notice by Judicial Assistant.
Matter set on **12/05/17** due to non-appearances and failure to file accounting.
Continued from 01/30/18. Administrator to file the accounting.

THIS CASE IS SET FOR HEARING ON **OSC re Sanctions** on Accounting Review

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

1. Letters of Administration issued to Jamie Waldie, step-daughter, on 08/16/16, full authority, no bond.
2. Final Inventory and Appraisal filed 01/05/17.
3. **Notice of non-payment of statutory fees and expenses by Probate Referee Burdette Garvin filed 02/09/18.**
4. **Need** accounting or status report.

RECOMMENDATION:

Inquire status.

(nb/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600740

CASE NAME: MTR OF MARJORIE CLEMMER

HEARING:

First and Final Account and Report of ARLINE HAWKINS and
Petition for allowance of fees filed.

COUNSEL:

ARLINE HAWKINS (PET)...DIANA J CARLONI
MARJORIE CLEMMER (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account; Final distribution and
Petition for Fees by Arline Hawkins, sister/ sole heir

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

- 1 Assets on hand: \$51,947.45
- 2 Current bond: \$110,000.00.
- 3 Petitioner and Attorney request statutory fees of \$3,518.29. Calculated.
- 4 Attorney requests reimbursement of bond premium renewal in the amount of \$550.00. Receipt of payment is attached. [LF pg. 17] **JTD**
- 5 Petitioner requests reimbursement of initial bond premium amount of \$550.00. **JTD**
- 6 Petitioner requests a reserve of \$600.00 for closing costs. **JTD**
- 7 Attorney failed to sign on page 7 of accounting. [LF. pg 8] **Need** same.
- 8 **Need** verified supplement re: statement regarding notice to Director of Health Care Services.
- 9 Notice given.
- 10 Proposed Order: 01/23/18, need statements re notice per Pr.C. § 9202; statement re sole and separate property, assets on hand

RECOMMENDATION:

Need to clear notes 7 & 8 then Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge for **03/25/19**

(ww)

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

DATE: 03/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601114

CASE NAME: MTR OF FRED ABILA

HEARING:

Accounting Review by ***

COUNSEL:

MICHAEL ABILA	(PET)...PRO/PER
FRED ABILA	(DEC)...

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 Michael Abila, son, on 01/26/17; full authority, \$170,000.00 bond.
2. Final Inventory and Appraisal filed 11/27/17; however, **need** bank/financial statements to support date of death balances per Local Rule 20-908.
3. **Need** accounting or status report.

RECOMMENDATION

Need to clear note 2-3.

(ww)

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

DATE: 03/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701285
CASE NAME: DRUSILLA SMITH MALLOY

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

COUNSEL:

WILLIAM ARNOLD MALLOY (PET)...PRO/PER
DRUSILLA SMITH MALLOY (DEC)...

GENERAL INFORMATION

Continued from 01/29/18 to file an amended petition.

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

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

1. Petitioner alleges to be sole heir; however, did not complete section 3e as to why bond should not be required. **JTD** The estate consists of \$250,000 in real property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
 - a. Court may wish to inquire if a Spousal Property Petition is to be filed.
2. Waivers of Bond by siblings, Tommy Ray Freney and Shirley Wilson Gilmore were filed on 01/26/18.
3. Section 5 indicates issue of a predeceased child; however, none is listed in section 8. Court may wish to clarify on record or in alternative; need verified supplement.
4. Notice to Petition to Administer Estate and proof of service filed 01/16/18; however, it is unclear if all people were noticed as it was indicated that there is issue of a predeceased child who is not listed. **See note 2.**
5. ~Proposed Form Order: 12/20/17

RECOMMENDATION

Court's discretion re notes 1, 3, and bond. If approved, set Accounting/Status Review **06/03/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

DATE: 03/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701306

CASE NAME: MTR OF ELIZABETH LUCILLE DAVIS

HEARING:

Petition to determine succession to Real Property

COUNSEL:

GRADY M DAVIS (PET)...FERRIS & SELBY
ELIZABETH LUCILLE DAVIS (DEC)...

GENERAL INFORMATION:

Continued from 01/30/18.

THIS CASE IS SET FOR HEARING ON [**Amended 02/05/18**] Petition to Determine Succession to Real Property (Estates \$150,000 or less) by Successor Trustee of The Davis Family Trust, Grady Davis ["Petitioner"-step-son].

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

1. Petitioner requests determination that decedent's real property located at El Mirage in San Bernardino County passes to petitioner without administration.
 - a. The first named executor in the will, Paul Davis, Jr., spouse, is deceased.
 - b. Petitioner is the second named Executor to Decedent's pour-over Will [LF, pg. 4] and the alleged Successor Trustee of a trust that is a devisee under Decedent's will.
2. Does Court require for a copy of the trust to be filed per Local Rule 20-1502 as the will conditionally incorporates decedent's Trust and to verify that petitioner is the named successor trustee? **JTD**
3. Notice given.
4. ~Proposed Form Order 12/27/17.

RECOMMENDATION:

Court's discretion.

(nb/ww)

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

DATE: 03/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800125

CASE NAME: DELFORD LEE RUNNELLS AKA DELFORD RUNNELLS

HEARING:

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

COUNSEL:

LINDA DIANA WELCH (PET)...PRISCILLA C. SOLARIO
DELFORD LEE RUNNELLS (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate of will for Letters of
Administration WWA with Full Authority under IAEA by Linda Welch, daughter/executor

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

1. Will waives bond. Net value of the estate consists of \$75,000.00 in real property.
The court may for good cause require that a bond be given, either before or after
issuance of letters per Pr.C. § 8481(b).
2. Section 2a petition is incomplete as to the request that decedent's will be admitted.
JTD.
3. Notice to Petition to Administer Estate and proof of service filed 02/16/18; however,
Court zip code is incorrect and section 4 is incomplete as to probating a will. **Need**
corrected notice.
4. ~Proposed Form Order: 02/08/18

RECOMMENDATION

Need to clear note 3. Court's discretion re bond and note 2. If approved, set
Accounting/Status Review for **06/03/19**. Any accounting to be filed 30 days in advance
local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 12

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

DATE: 03/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800126

CASE NAME: BERNARD JONES

HEARING:

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

COUNSEL:

ANTON JONES (PET)...CANDICE A GARCIA-RODRIGO
BERNARD JONES (DEC)...

GENERAL INFORMATION

Letters of special administration issued to Anton Jones, son, on 03/14/18, no IAEA powers, bond of \$59,000.00.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Anton Jones, son

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

1. Bond of \$59,000.00 issued for temporary administration on 03/14/18. Appears Ok. Net value of the estate consists of \$59,000.00 in real property.
2. **Need** declination to act by Janice Jones, spouse, as she has higher priority per Pr. C. § 8461(p).
3. **Need** proof of publication
4. ~Proposed Form Order: 02/08/18

RECOMMENDATION

Need to clear notes 2 & 3 then Court's discretion. If approved, set Accounting/Status Review **06/03/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 13

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

DATE: 03/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800135

CASE NAME: MTR OF GERALD LUVERNE RUDENICK

SEE ALSO 13A & 13B

HEARING:

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

COUNSEL:

MICHELLE SUTTON (PET)...FULLERTON LEMANN SCHAEFER & DO
JERRI M. WHITTAKER (PET).....HARTNELL, BRYAN C.
GERALD LUVERNE RUDENICK (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON:

- **Petition #1-** Petition for Letters of Administration with Full Authority under IAEA by ***Michelle Sutton, daughter***
- **Petition #2-** Petition for Will & for Ltrs Testamentary w/limited IAEA by ***Jerri Whittaker, daughter/executor***

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

Petitioner 1- Michelle Sutton, daughter

1. Section 2d of petition indicates that bond should not be required but section 3e is incomplete. **Need** verified supplement. The estate consists of \$450,000.00 of which \$200,000.00 is personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b) and per Pr.C. § 8571 as petitioner is a non-resident. **JTD**.
2. Section 2b as to person to be appointed and as to what capacity is incomplete; however, proposed order and letters indicate that Michelle Sutton is to be administrator. **JTD**
3. Notice of Hearing filed 02/23/18; however, **need** mandatory form Notice to Petition to Administer Estate and proof of service.
4. **Need** proof of publication

5. ~Proposed Form Order: 02/13/18

Petitioner 2- Jerri Whittaker, daughter/executor

6. Will waives bond and petitioner is sole beneficiary of will. The estate consists of \$149,000.00 of which \$24,000.00 is personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
7. **Need** proof of publication.
8. ~Proposed Form Order: 02/22/18

RECOMMENDATION

Need to clear notes 1, 3 & 4, and 7. Court's discretion re bond. If approved, set Accounting/Status Review for **06/03/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 13A Add-on

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

DATE: 03/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800135

CASE NAME: MTR OF GERALD LUVERNE RUDENICK

SEE ALSO 13 & 13B

HEARING:

Hearing re: Petition for Will & for Ltrs Testamentary w/limited IAEA

COUNSEL:

MICHELLE SUTTON (PET)...FULLERTON LEMANN SCHAEFER & DO
JERRI M. WHITTAKER (PET).....HARTNELL, BRYAN C.
GERALD LUVERNE RUDENICK (DEC)...

See notes on matter 13.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 13B Add-on

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

DATE: 03/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800135

CASE NAME: MTR OF GERALD LUVERNE RUDENICK

SEE ALSO 13 & 13A

HEARING:

Hearing re: Petition for Letters of Special Administration with Limited IAEA

COUNSEL:

MICHELLE SUTTON (PET)...FULLERTON LEMANN SCHAEFER & DO
JERRI M. WHITTAKER (PET).....HARTNELL, BRYAN C.
GERALD LUVERNE RUDENICK (DEC)...

No Notes-Special Administration. JTD.

(ww)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

CONSERVATORSHIPS

DATE: 03/19/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS0600004

CASE NAME: MTR OF BRENDA TUJUANA BUTLER

HEARING: Petition for Appointment of Successor Conservatorship of The Person

COUNSEL:

VEDA D. CALDWELL	(CP)...PRO/PER
BRENDA TUJUANA BUTLER	(CTP/CEP)...PRO/PER
NIDIRAH STEPHENS	(SC)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Nidirah Stephens, daughter

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

1. Veda Caldwell, sister, was appointed as conservator of the person only on 12/11/06, no bond.
2. No bond- Person only
3. Section 5b of petition does not indicate that there is a vacancy in office of conservator. Court may wish to inquire why the appointment is being requested, or in alternative, need verified supplement. [LF pg. 5] **JTD**
4. A petition to resign as conservator has not been filed by Veda Caldwell, current conservator.
5. Petitioner seeks medical powers. **Need** Capacity Declaration.
6. **Need** return of Citation.
7. **Need** Certificate of Completion of the Conservatorship Training Class.
8. **Need** Notice of Hearing and proof of service.
9. **Need** CI report.
10. Proposed Form Order: 02/14/17; however indicates 2356.5 powers of placement that were not requested in petition.

RECOMMENDATION

Need CI report and to clear notes 5-8 then Court's discretion. If approved, set hearing for Compliance Review for **10/22/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5

(ww)

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

DATE: 03/19/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1200075

CASE NAME: GRACE NAGATA

HEARING: Hearing re Final Discharge

COUNSEL:

MELODIE Z SCOTT (CPE)...HARTNELL LAW GROUP
GRACE NAGATA (CEP)...
WALTER T MOORE (PET)...
PACIFIC WESTERN BANK (TP)...HEMAR, ROUSSO & HEALD, LLP

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Melodie Scott, PPF, approved on 03/13/17.
2. **Need** receipt by personal representative of the estate of Grace Nagata of assets on hand remaining in conservatorship.
3. **Need** receipt by McKenzie Mortuary Services reflecting that \$8,981.82 fee was paid.
4. **Need** Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b) if parcels of unimproved property were not sold or transferred.
5. **Notice of assignment order assigning Melodie Scott's rights to payment etc filed 07/21/17 by Pacific Western Bank. Does Court wish to require a receipt by said bank for amount of \$3,360.00 that was due to Melodie Scott? JTD**
6. **Notice of non-payment of statutory fees and expenses in the amount of \$110.00 filed by Burdette Garvin, probate referee on 01/25/18.**

RECOMMENDATION

Inquire status.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/19/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1200225

CASE NAME: TED RITCHIE WATSON

HEARING:

Hearing Re: CONCERNS RE:CI REPORT

COUNSEL:

TINA E WATSON (CP)...E. JOAN NELMS
TED RITCHIE WATSON (CTP)...MELVIN L FRIEDLAND

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Concerns re: CI Report

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

1. Court set matter on 02/16/18 due to a confidential interoffice memo from the Court Investigator.
2. Court to see Report by Counsel Friedland filed on 03/01/18.

RECOMMENDATION

Court's discretion.

(ww)

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

DATE: 03/19/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1200274

CASE NAME: CORINE WINFREY

HEARING:

Fifth Account and Report of MARILYN STEWART and Petition for allowance of fees filed.

COUNSEL:

CORINE WINFREY	(CEP)...
H.J. BRYANT	(PET/CE)...HARRY A OLIVAR
MARILYN STEWART	(CPE/SC)... PRO/PER
LINDA THOMAS	(OBJ)...KATHLEEN MAUREEN O'DEA
DENNIS WINFREY	(KATHLEEN MAUREEN O'DEA)
LINDA THOMAS	(LEROY R DAVIS)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Fifth Account and Petition for Fees by Marilyn Stewart, daughter/successor conservator

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

1. Accounting period: 01/01/16-12/31/17
2. Assets on hand: \$5,971.00 cash; however, amount in summary of account reflects \$5,569.91. Court to clarify accurate amount, or in alternative, need verified supplement. [LF pg. 3] **JTD**
3. Petitioner requests fees in the amount of \$20,947.50 for 1,197 hours at \$17.50/hour. Generally described. Does Court wish for itemization? [LF, pg. 3]. **JTD**
4. Petitioner and Jamel McLemore, grandson, prepared the accounting.
5. Petitioner requests to be removed as a responsible party and to dispense with accounting review for Corine Winfrey. [LF pg. 4] **JTD**
6. **Need** entire bank statement for end period as only page 2 of 4 is attached. [LF pg. 13]
 - a. Purchase on 11/28/17 for "Legal Resource San Bernardino" in the amount of \$463.50 does not appear on Schedule C. **Need** corrected Schedule.
7. **Need** residential facility statements.
8. The prayer is missing. **Need** prayer in regards to requests made in Accounting.
9. **Need** Accounting signed and dated by petitioner under penalty of perjury.

10. Petitioner also submitted an Ex parte petition to dispense with accounting and order, which was received on 02/09/18 for accounting period 01/01/16-12/31/17.

JTD

11. No proposed order. Submit order after hearing.

RECOMMENDATION:

It appears the estate qualifies for a Pr.C. § 2628 waiver- see note 10. Need to clear notes 6-9 then Court's discretion re remaining notes. If approved, Court to set hearing next Accounting Review hearing on **04/22/19**.

(ww)

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

DATE: 03/19/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300065

CASE NAME: LIDIA DEKTEROV

SEE ALSO 23

HEARING:

Second and Final Account and Report of GEORGE DEKTEROV and
Petition for allowance of fees filed.

COUNSEL:

GEORGE DEKTEROV	(CP/CPE)...ELIZABETH MCDONOUGH BARRY
DIANE D HARKISON	(CE)...MARIELLEN ROSS
LIDIA KEKTEROV	(PCE/CEP)...THE ALVAREZ FIRM
VICTOR DEKTEROV	(PET)...PRO/PER
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
VICTOR DEKTEROV	(APP/OBJ)...AMY M COHEN
SURETEC INSURANCE CO	(PRO/PER)

XREF: PROPS1400495 *THE SAVAGE TRUST*

GENERAL INFORMATION:

Continued from **12/14/17** to be heard with trust account. Court orders Victor Dekterov to file written objections by 01/02/18.

Continued from 01/17/18. Court orders Attorney John Setlich to be present in court if he still represents Victor Dekterov.

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 2nd and Final Conservatorship Account and Petition for Allowance of Fees by George Dekterov, son.

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

1. Conservatee died on 08/21/16.
2. Accounting period 04/01/16 - 10/31/16. Normally pre and post death accountings are required per Pr. C. § 2620(b). However, all assets were transferred to trust post death. **JTD**
3. Assets on hand \$0.
4. Current bond \$20,000.
5. Conservator waives fees.

6. Attorney seeks fees of \$39,764.06 at \$350 per hour to be paid by Trust. Costs of \$239.06 for copies and postage appear to be overhead per local rule 20-1406(d). [Acct. 10/30 LF pgs. 27-33]. **JTD**
7. Notice given.
8. **Objections filed by Victor Dekterov, son, on 01/26/18.**
9. **Reply by George Dekterov to objections by Victor Dekterov filed 01/17/18.**
10. No proposed order. Submit after hearing.

RECOMMENDATION

Matter is contested. Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **03/25/19**.

(lc/lh/ww)

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

DATE: 03/19/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1400276

CASE NAME: Rita Sue Pesch

HEARING:
Hearing re Final Discharge

COUNSEL:

JOHN PESCH (CPE)...PRO/PER
RITA SUE PESCH (CEP/CEE)...KARIN E HORSPOOL
KARIN E HORSPOOL (PET)...KARIN E HORSPOOL

Waiver of Court Fees and Costs filed by JOHN PESCH is GRANTED

GENERAL INFORMATION

Continued from **06/01/17**. Petitioner reports he has filed an appeal of attorney fees and exhibits. Court set a hearing date on those issues. Petitioner advised he need to file a petition for final discharge and order.

Continued from 01/17/18. Court orders John Pesch to be present at the next hearing. Court is in need of an order for the final account still.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Requirement for final account waived for, John Pesch, on 10/28/16. The court found that the reasonable fee for court-appointed counsel's work is \$12,356; from the sums on deposit, court appointed counsel is to be paid \$8,500; remainder to be submitted via voucher. The balance of the funds on deposit, \$4,600.77, is to be paid to the conservator. **Need** order for submitted matter.
2. Receipt for Karin Horspool filed 05/31/17.
3. Ex Parte Petition for Final Discharge and Order returned by Court on 06/14/17. **Need** corrected Ex Parte Petition for Final Discharge and Order after Order waiving final account is signed and filed.

RECOMMENDATION

Inquire status.

(lc/lh/ww)

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

DATE: 03/19/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600266

CASE NAME: BETTY JANE WOODSON

HEARING:
Petition for attorney's fees

COUNSEL:
ALICE L WINCHESTER (PET)...HARTNELL LAW GROUP
BETTY JANE WOODSON (DEC)...MARK J. FLORY

GENERAL INFORMATION

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

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

- 1 Petitioner, Mark Flory, was appointed counsel on 01/17/17.
- 2 Petitioner requests fees of \$1,697.00 for 8 hours at \$105/325/350 per hour for paralegal and attorney services. Itemized. [Pet. 02/05/18 LF pgs. 7-8].
- 3 Petitioner additionally requests anticipated amount of \$682.50 for 1.5 hours at \$105/hour of paralegal time and 1.5 hours at \$350/hour of attorney time for appearance that will be made this date. Generally described.
- 4 Total amount of fees being requested between the itemized time and anticipated time is \$2,379.50. **JTD**
- 5 Notice of hearing and proof of service filed 02/06/18; however section 4a & b as to date mailed and place of mailing is incomplete. **JTD**
- 6 ~Proposed Order: 02/05/18

RECOMMENDATION

Court's discretion

(ww)

Future Hearings: 6/05/18: Conservatorship Compliance Review Hearing
7/31/18: Accounting Review

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

DATE: 03/19/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700465

CASE NAME: MTR OF MARIA FELIPA PEREZ

SEE ALSO 22

HEARING:

Hearing Re: APPOINTMENT OF CONSERVATOR OF THE PERSON

COUNSEL:

LETICIA PEACOCK (CP)...MAREND M GARRETT
MARIA FELIPA PEACOCK (CTP)...WALTER T. MOORE

GENERAL INFORMATION

Temporary orders denied on 01/03/18. Walter Moore appointed as counsel for proposed conservatee.

THIS CASE SET FOR HEARING ON [**Amended 01/29/18**] Petition for Appointment of Conservator person only by Leticia Peacock, daughter

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

1. No bond- person only
2. Petitioner seeks medical powers. **Need** Capacity Declaration.
3. Petitioner indicates that proposed conservatee has dementia. **Need** Report of Counsel Walter Moore.
4. Petitioner indicates that proposed conservatee resides currently in **Florida**.
5. Section 3b(1) as to whether petition is or is not a creditor is incomplete. Court may wish to inquire; or in alternative, need verified supplement. **JTD**
6. Section 3f re: due diligence is incomplete. **Need** verified supplement.
7. Section 8 is conflicting as 8a indicates that proposed conservatee will attend the hearing and then in 8d that conservatee is out of state and will not attend. Court may wish to inquire; or in alternative, need verified supplement. **JTD**
8. Section 9 as to medical treatment is marked; however, 2355 powers are not requested in section 1.g. **JTD**
9. Court to see Confidential Supplemental Information.
10. **Need** return of citation as to amended petition.
11. **Need** List of Required Contacts (Local form SB-12224).

12. **Need** Notification of Court of Conservatorship Address. (Local form SB-14522)
13. Confidential Screening Form filed 12/27/17, however, the required attachment is missing. **Need** amended form.
14. **Need** Certificate of Completion of the Conservatorship Training Class
15. Notice of Hearing filed 02/02/18 as to amended petition hearing on 03/06/18; however, **need** notice sent to Ana Thomson (daughter); Sarah Webb and Alexandra Nordquist (granddaughters).
 - a. Does Court wish for a new Notice of Hearing to be served as the 03/06/18 hearing was advanced to 02/05/18 and continued to 03/19/18? **JTD**
16. **Court to see** Notice of no report by CI filed on 01/23/18.
17. **Court to see** Notice of Lodgment re: Physician's report filed 01/29/18.
18. **Objection by Maria Perez, proposed conservatee filed on 01/03/18; however, need proof of service.**
 - a. **Declaration by Ana Thomson in support of objection by Maria Perez filed 01/03/18; however, need proof of service.**
 - b. **Declaration by Michael Blaskey in support of objection by Maria Perez filed 01/03/18; however, need proof of service.**
19. ~Proposed Form Order: 12/27/17

RECOMMENDATION

Matter is contested. Need Report of Counsel and need to clear notes 2, 6, 10-15 and Court's discretion re remaining notes . If approved, set hearing for Compliance Review for **10/22/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 03/19/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700465

CASE NAME: MTR OF MARIA FELIPA PEREZ

SEE ALSO 21

HEARING:

Petition for Appointment of Conservator

COUNSEL:

LETICIA PEACOCK

(CP)...MAREND M GARRETT

MARIA FELIPA PEACOCK

(CTP)...WALTER T. MOORE

See notes on matter 21.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/19/18 TIME: 9:30 DEPT: S36P

CASE#: PRO PS1400495

CASE NAME: THE SAVAGE TRUST

SEE ALSO 18

HEARING:

Petition for Approval of First Account and Report of GEORGE DEKTEROV and Petition for allowance of fees filed.

COUNSEL:

THE SAVAGE TRUST	(TRU)...
DIANE D HARKISON	(PET/STE)...MARIELLEN ROSS
GEORGE DEKTEROV	(PET)...BARRY & BARRY
VICTOR DEKTEROV	(PRO/PER)

XREF: CONPS1300065 *LIDIA DEKTEROV*

GENERAL INFORMATION:

Continued from 01/17/18. Court orders objections to be filed by 02/16/18 or court will deem waived.

THIS CASE IS SET FOR HEARING ON 1st Account of Successor Trustee, George Dekterov

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

1. Accounting period: 02/05/16 to 08/14/17, although it should commence as of date of appointment as Successor Trustee on **01/06/16**. However, the accounting appears to overlap with prior trustee's final accounting period ending 04/18/16. Need verified supplement. **(Supp 01/17/18 petitioner indicates that the trust property was not received from Diane Harkison until 02/05/16.) JTD**
2. Assets on hand: \$73,137.14, cash.
3. Current bond: \$200,000.00.
4. Assets marshalled from former trustee, Diane Harkison, in the amount of \$161,761.84 are identified as Schedule "A" Receipts; however, they should be identified as assets on hand at beginning of account period. **JTD**.
5. Petitioner requests attorneys' fees of \$4,900; however, Exhibit "B" with itemization of attorney time and fees is not included as alleged. Need verified

supplement. **(Supp. 01/17/18 includes itemization of 14 hours at \$350.00/hour attorney time for total of \$4,900.00.) JTD**

6. Notice of Hearing filed 01/22/18; however, section 3b does not specify court address. **JTD**
7. No proposed order submitted.

RECOMMENDATION:

Court's discretion. **If** trust accounting will continue to be required then Court to set next Accounting Review date for **12/16/19**.

(lh/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/19/18 TIME: 9:30 DEPT: S36P

CASE#: SC SS01826

CASE NAME: BRANDON REYES SPECIAL NEEDS TRUST

HEARING:

Accounting Review by ***

COUNSEL:

MANUEL D REYES (CP/TEE)...GRESHAM SAVAGE NOLAN & TILDEN
DORIS J REYES (CP)...GRESHAM SAVAGE NOLAN & TILDEN
BRANDON J THEURET (CTP)...
BRANDON J. REYES SPECIAL NEEDS TRUST (TRU)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 8th Account for Doris Reyes, mother, approved on 08/08/16
2. **Need** 9th Account beginning with date of 01/01/16.

RECOMMENDATION

Inquire status of accounting.

(ww)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 03/19/18 TIME: 8:30 DEPT: S37P

CASE#: CON PS1800039

CASE NAME: MTR OF OLGA G HERRERA

HEARING: Petition for Appointment of Conservator

COUNSEL:

MARTHA UNG

(CPE)...LAW OFFICE OF MARY M. BADER

OLGA G HERRERA

(CEP)...

GENERAL INFORMATION:

Temporary orders granted to Martha Ung of the person and estate on 02/13/18

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, of the person and estate by Martha Ung, Petitioner/daughter.

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

1. Petitioner does not indicate bond amount. It appears estate consists of public benefits. Suggest minimum bond of \$20,000. JTD
2. Petitioner seeks dementia powers. **Need** appointment of counsel for report.
3. Petitioner seeks medical powers. Capacity Declaration filed 02/26/18 is incomplete at item #4a as to date physician saw proposed conservatee. **Need** completed form.
4. **Need** return of Citation.
5. Certificate of Completion of the Conservatorship Training Class filed 03/01/18.
6. Petitioner seeks powers to obtain a copy of the American National Insurance Life Policy issued to proposed conservatee, make elections and work with Medi-Cal and other California and federal agencies re the conservatee's eligibility for government benefits.
7. Need Court Investigator report.
8. ~Proposed Form Order: 02/07/18

RECOMMENDATION:

Need to clear notes 2-4 & 7, then Court's discretion re Bond. If approved, set hearing for Compliance Review for **10/22/18** 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 **06/03/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.
(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 03/19/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1300779

CASE NAME: Terry E Lamb

HEARING:

Hearing re Final Discharge

COUNSEL:

WAYNE D LAMB	(PET)...	PALMIERI TYLER WIENER WILHELM
TERRY E LAMB	(DEC)...	
STEPHANIE D LAMB JONES	(PET)...	BRYAN C HARTNELL
TIM OSTERMAN	(TP)...	HARTNELL LAW GROUP
SUSAN LOUGH	(BRYAN C. HARTNELL)	
CLIFTON STEPPE	(BRYAN C. HARTNELL)	
KATHLEEN TSCHUDIN	(BRYAN C. HARTNELL)	
BRYAN C HARTNELL	(HARTNELL LAW GROUP)	

Discharge order sent to department for signature on 02/22/18

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/19/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400017

CASE NAME: William Robert Becker, Jr

HEARING: FIRST AND FINAL Account and Report of MONICA SONIA LANE-
BECKER and Petition for allowance of fees filed.

COUNSEL:

MONICA SONIA LANE-BECKER	(PET)...JASON L GAUDY
WILLIAM ROBERT BECKER Jr	(DEC)...
LAURA JEAN O'NEAL	(PET)...PRO/PER
BRANDON BECKER	(PET)...KENNETH L EGANS

GENERAL INFORMATION:

Continued from 12/27/17 Court notes settlement agreement has not been filed. Ms. Hayashi reports that small items, for example a piggy bank, have not been given to her client as agreed in settlement. The court orders that a petition to terminate as this is a no asset estate should be filed.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by
Monica Lane-Becker (spouse/executor)

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

1. **Need** petition to terminate estate.
2. Assets on hand: \$0
3. Petitioner was appointed executor on 12/03/15 with full authority.
4. Brandon Becker, decedent's son, and Laura Jean O'Neal, decedent's sister, filed a will contest and objected to petition. A settlement was reached in which Brandon Becker kept all vehicles and tools, and well as a lump sum payment of \$17,000 upon transfer of real property to petitioner, which would constitute his entire inheritance. Court approved settlement on 08/28/15, and terms were read onto the record. **Need** verified supplement with copy of settlement agreement signed by parties and Court. **Supplement 12/20/17. The settlement read onto the court's record was 08/28/18. There is no signed agreement of Court Order. However, terms of settlement have been carried out and completed.**
5. Petitioner and attorney waive statutory compensation and/or extraordinary fees.
6. Notice was given.
7. No proposed order submitted.

RECOMMENDATION:

Need to clear note 1 & 4, then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **03/25/19**.

(lh/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/19/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500468

CASE NAME: NANCY A STRAWN

HEARING:

Accounting Review by ***

COUNSEL:

MARK STRAWN	(PET)...LAW OFFICE OF MINDY BISH
CINDY HOVATER	(PET)...LAW OFFICE OF MINDY BISH
NANCY A STRAWN	(DEC)...

GENERAL INFORMATION:

Continued from **10/18/16** and **01/30/17**. There being no appearance, the Court orders Mark Strawn and/or Mindy Bish to appear at the next hearing.

Continued from **04/24/17, 07/10/17, 09/25/17 and 11/13/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued to Mark Strawn and Cindy Hovater, son and daughter, on 08/13/15; full authority, no bond.
2. Final Inventory and Appraisal filed.
3. Need accounting or status report.

RECOMMENDATION:

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

(nb/ww/nb/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/19/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500518

CASE NAME: MTR OF RUBEN QUEZADA ALVARADO

HEARING:

Accounting Review by ***

COUNSEL:

GARY G QUEZADA SR (PET)...RONALD W ASK
RUBEN QUEZADA ALVARADO (DEC)...

GENERAL INFORMATION:

Continued from **06/19/17**. Hearing continued for notice to be given.

**Continued from 08/28/17 continued at request of Counsel for property to be sold.
Court clarifies property is not in Ojai but in Santa Paula.**

THIS CASE IS SET FOR HEARING ON Status Report (filed 12/13/16) by Administrator,
Gary G. Quezada ["Petitioner"].

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

1. Petitioner alleges the estate is not in a condition to be closed as he is attempting to negotiate a buy-out of the Santa Paula property and if unsuccessful, intends to file a partition action, to force the sale of the property, to obtain the proceeds owed to the estate. Further, petitioner indicates he has commenced a probate action in LA County of his late brother's estate in order to seek restitution from his estate for promissory notes owed to this estate amounting to at least \$100,000.
2. Petitioner does not request a specific time in which to close estate. Suggest 12 months.

RECOMMENDATION:

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

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

DATE: 03/19/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600207

CASE NAME: EDDIE HERNANDEZ

HEARING:

FIRST & FINAL Account and Report of KOREN MATTSON and Petition
for allowance of fees filed.

COUNSEL:

KOREN MATTSON	(PET)...JUDD MAYSUNAGA
EDDIE HERNANDEZ	(DEC)...
USHER LAW GROUP	(TP)...PRO/PER

Waiver of Court Fees and Costs filed by KOREN MATTSON is GRANTED
TOTAL FEES WAIVED TO DATE: \$2401.00

GENERAL INFORMATION

Continued from 12/27/17 at request of Court for petition to terminate to be filed as this is a no asset estate. Notice to be filed.

THIS CASE IS SET FOR HEARING ON First and Final Account and Report of Koren Mattson, Administrator/Petitioner

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

1. Need petition to terminate estate as directed by court on 12/27/17.
2. Need notice.
3. Current bond \$200,000
4. Assets on hand: \$0
5. Petitioner alleges there is no property of any kind belonging to the estate and subject to administration. No assets were marshalled. Does Court wish to require a proper petition to terminate probate proceedings for lack of assets per Pr. C. §12251?JTD
6. The initial petition for letters of administration filed 03/03/16 indicates estimated assets of \$920,000, consisting of real property and personal property. **Supp. 12/13/17, Counsel learned all assets in the name of decedent were held as joint tenants with other family members.**
7. Inventory and Appraisal has not been filed.
8. American Express submitted an approved creditor's claim in the amount of \$2,052.80; however claim remains unpaid due to lack of assets.

9. Notice was given.
10. No proposed order submitted.

RECOMMENDATION

Court's discretion re note 1-2. If approved, set hearing on final discharge for **03/25/19**.
(lh/cs)

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

DATE: 03/19/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700168

CASE NAME: MTR OF ANNA S SANDERS

HEARING: Report on waiver of Account and Report of STEPHEN A SANDERS and
Petition for allowance of fees filed.

COUNSEL:

STEPHEN A SANDERS (PET)...PRO/PER
ANNA S SANDERS (DEC)...

Waiver of Court Fees and Costs filed by STEPHEN A SANDERS is GRANTED

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Report on Waiver of Accounting and Petition for
Final Distribution, by executor, Stephen Sanders

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

1. All heirs waived accounting.
2. Assets on Hand \$145,000 consisting of real property.
3. Petitioner reports accounting period as 04/19/17 to 03/19/18
4. It appears no statutory fees requested.
5. Need Notice of Hearing with proof of service to Kimberly Sanders.
6. Need statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary (Pr. C. § 1064 (a)(4)). Need verified supplement.
7. No reserves are requested.
8. Proposed Order 01/23/18. Accounting period does not match report; need assets on hand.

RECOMMENDATION

Need to clear notes 5-6, then Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **03/25/19 and vacate 06/27/18 hearing**
(cs)

Future Hearing: 6/27/18: 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: 03/19/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700707

CASE NAME: MTR OF RICHARD HERNANDEZ

SEE ALSO 9

HEARING: Petition for PROBATE OF WILL/LETTERS TESTAMENTARY W/FULL
IAEA

COUNSEL:

HARWOOD GARLAND	(PET)...EDWARD G OPERINI
RICHARD HERNANDEZ	(DEC)...
LORENA JANETTE HERNANDEZ	(PET)...MICHAEL C MADDUX

Points and Authorities filed. Currently under review by Legal Research. (LR)

GENERAL INFORMATION

Continued from **10/11/17**.

Continued from 12/27/17 to clear notes. Court makes non-recusal disclosure regarding the Operini Law Firm. No objections are made. The Court orders that all beneficiaries are to be give notice of these matters.

THIS CASE SET FOR HEARING ON

- **Petition #1** for Probate, Letters Testamentary with Full Authority under **IAEA by Harwood Garland, executor**
- **Petition #2** for Letters of Administration w/WA with Full Authority under IAEA by **Lorena Hernandez, spouse**

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

Petition for Probate of Will by Harwood Garland

1. Bond in the amount of \$300,000 is being requested. Ok. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. The will has holographic interlineations amending bequests to Lorena Hernandez, Steven Anthony Hernandez, Raquel Solis, Amanda Bissland, Sarah Wendy, Starr Aranda, Bernice Aranda and Ruben Hernandez, and holographic instructions.

Interlineations are not dated or initialed by Decedent. **Points and Authorities concerning validity of will filed.**

3. Declinations to act by proposed co-executors Irene Escalante, Preston Hickey and Juan Chavez are attached.
4. **Competing petition filed 09/11/17 by Lorena Hernandez, spouse.**
5. **Will contest in the form of an objection by Lorena Hernandez, spouse, filed on 09/18/17. Need return of Summons.**
6. **Exhibits to Objection to Validity of Will filed 09/20/17. Need Proof of Service.**
7. **Reply to Lorena Janette Herndanez' Objections filed 10/10/17. Need Proof of Service.**
8. ~Proposed Form Order: 07/17/17

Petition for Letters of Administration w/WA by Lorena Hernandez

9. Petitioner requests \$300,000 bond. Appears sufficient.
10. It appears competing petitioner, Harwood Garland, has right to appointment as personal representative per Pr. C. §8420.
11. **Need** Declinations to Act from Harwood Garland, Irene Escalante, Preston Hickey, and Juan Chavez.
12. Notice of Petition to Administer Estate filed 09/18/17 is incomplete at item #4 as to will admitted to probate. **Need** corrected Notice and proof of service.
13. Proof of Publication filed 11/08/17 does not include statutory language regarding probate of admitted will per Pr. C. §8100. **Need** proper notice and proof of publication.
14. Declaration in Support of Petition by Steven Hernandez (son of decedent) filed 09/26/17. JTD
15. ~Proposed form Order: 09/11/17

RECOMMENDATION

Matter is contested.

Need to clear notes 5-7; 11-13. If approved, set Accounting/Status Review for **06/03/19**.

Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/lh/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/19/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700707

CASE NAME: MTR OF RICHARD HERNANDEZ

SEE ALSO 8

HEARING:

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

COUNSEL:

HARWOOD GARLAND	(PET)...EDWARD G OPERINI
RICHARD HERNANDEZ	(DEC)...
LORENA JANETTE HERNANDEZ	(PET)...MICHAEL C MADDUX

Waiver of Court Fees and Costs filed by LORENA JANETTE HERNANDEZ is GRANTED

See notes on previous matter # 8.

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

DATE: 03/19/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700897

CASE NAME: **MF** LOREANO MANUEL GASPAR

SEE ALSO 11

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL AUTHORIZATION
TO ADMINISTER ESTATE UNDER IAEA

COUNSEL:

MANUEL GASPAR	(PET)...JAMES MERCER
MARIA GASPAR	(PET)...JAMES MERCER
LOREANO MANUEL GASPAR	(DEC)...
MARIA MANUELA SOARES	(PET)...JAMES MERCER
JANAE GASPAR	(PET)...JOSEPH D BORJAS

GENERAL INFORMATION:

Temporary orders denied on 10/05/17. Action consolidated physically with PROPS1700970; Case PROPS1700897 deemed master file. Counsel to submit order re consolidation.

Continued from **12/27/17**. Letters of special administration issued to Maria Manuela Gaspar Soares \$20,00 bond. If notes not cleared, matter will be dismissed.

Continued from 01/25/18 to be heard with future hearing date.

THIS CASE IS SET FOR HEARING ON

- **PROPS1700897 Petition 1** for Letters of Administration with full authority under IAEA by Manuel and Maria Gaspar (parents) to appoint Maria "Manuela" (Gaspar) Soares
- **PROPS1700970 Petition 2** for Letters of Administration with full authority under IAEA by Janae Gaspar

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

Petition - 1 to appoint Maria "Manuela" (Gaspar) Soares –sister

1. Requested bond \$205,000. Appears sufficient.
2. Proof of Publication filed 01/30/18; however, does not include all aka's. JTD
3. ~Proposed form Order: 09/11/17

Petition - 2 Janae Gaspar – spouse.

4. Petitioner requests bond of \$120,000. Court to clarify estimated assets identified in competing petition [filed 09/11/17 by Marias Gaspar] to determine bond. JTD
5. Petitioner Janae Gaspar appears to have priority of appointment per Pr. C. §8461.
6. **Objections filed by Manuel and Maria Gaspar, parents, on 12/21/17.**
7. ~Proposed form Order: 09/29/17

RECOMMENDATION:

Matter is contested.

Court's discretion re bond and notes 2 and 4. If approved, set future hearing for Accounting/Status Review on **06/03/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh/lc/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/19/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700897

CASE NAME: **MF** LOREANO MANUEL GASPAR

SEE ALSO 10

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

COUNSEL:

MANUEL GASPAR	(PET)...JAMES MERCER
MARIA GASPAR	(PET)...JAMES MERCER
LOREANO MANUEL GASPAR	(DEC)...
MARIA MANUELA SOARES	(PET)...JAMES MERCER
JANAE GASPAR	(PET)...JOSEPH D BORJAS

Waiver of Court Fees and Costs filed by JANAE GASPAR is GRANTED

Court to see notes on matter #10.

Superior Court of Calif, County of San Bernardino

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

DATE: 03/19/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701118

CASE NAME: MTR OF DEAN LEE McADAMS

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

COUNSEL:

STEVEN JAY MCADAMS (PET)...PETER M BOCHNEWICH
DEAN LEE MCADAMS (DEC)...

GENERAL INFORMATION:

Continued from 12/27/17 at request of Court. Proof of publication does not have decedent's middle name. Matter continued to re-publish

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Steven McAdams, brother/Petitioner

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

1. Requested bond \$315,010. Appears sufficient.
2. ~Proposed form Order: 10/31/17

RECOMMENDATION:

RFA. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **06/03/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/19/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800137

CASE NAME:

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

COUNSEL:

ANDREW YEADON (PET)...GABRIELLE R RANSELL
RAE FRANCES YEADON (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Andrew Yeadon, son/Petitioner

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

1. All heirs waive bond. Estate value \$275,373.14. The court may for good cause require that a bond be given, either before or after issuance of letters. Prob. Code §8481(b).
2. Petition is not signed by attorney Gabrielle Ransdell. Need same.
3. Need proof of publication.
4. ~Proposed Form Order: 02/09/18

RECOMMENDATION

Need to clear notes 2-3. Court's discretion re bond. If approved, set Accounting/Status Review for **06/03/19**. Any accounting to be filed 30 days in advance local rule 20-901.

Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/19/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1600019

CASE NAME: WADE H FORDYCE AND DORRIS G FORDYCE LIVING TRUST

HEARING: Petition for removal of trustee and appointment of successor trustee

COUNSEL:

KELLY DEAN FORDYCE (PET)...PRO/PER
WADE H FORDYCE AND DORRIS G FORDYCE LIVING TRUST (TRU)...
ROBIN LEE FORDYCE (RES)...HOWARD R HAWKINS

Waiver of Court Fees and Costs filed by KELLY DEAN FORDYCE is GRANTED

Currently under review by Legal Research.
(LR)

Need 30 days' notice to trustees Robin Fordyce, Candyce Leffingwell, and Roger Fordyce.

Superior Court of Calif, County of San Bernardino

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

DATE: 03/19/18 TIME: 8:35 DEPT: S37P

CASE#: TRU PS1800029

CASE NAME: DENNIS PAUL SHANNON LIVING TRUST

HEARING:

Petition for Order Determining Trust's Title to Real
Property (Heggstad Petition)

COUNSEL:

ERIN YELA (PET)...CANDICE A GARCIA-RODRIGO
DENNIS PAUL SHANNON LIVING TRUST (TRU)...PRO/PER

Currently under review by Legal Research.
(LR)

Probate Code section 851 was amended [eff. Jan. 1, 2018] and contains a new subdivision (c) which requires the Notice of Hearing to include:

- (1) a description of the property, and for real property mandates the notice state the street address or, if none, a description of the property's location and assessor's parcel number;
- (2) a description of relief sought pursuant to Section 859 if applicable; and
- (3) a statement advising any interested person that he or she may file a response.

Notice:

The Notice of Hearing filed does not comply with one of more of these mandatory requirements. Petitioner or counsel may request a continuance to correct the Notice deficiency.

Waiver of Notice filed 03/08/18 by Maureen Shannon and Jay Shannon.
(cs)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 03/19/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400167

CASE NAME: MTR BRIAN MCGINNIS

SEE ALSO 17

HEARING: Conservatorship Compliance Review Hearing on SUPPLEMENTAL PETITION FOR CONSERVATORSHIP of GLORIA DYANN THOMAS

COUNSEL:

THERESA MCGINNIS	(CPE)...SAMUEL CROWE & ASSOCIATES
PETER MCGINNIS	(CPE)...SAMUEL CROWE & ASSOCIATES
BRIAN MCGINNIS	(CEP)...LENITA A SKORETZ
GLORIA DYANN THOMAS	(PCR)...BRIAN G THORNE
BRIAN MCGINNIS	(PCE)...PRO/PER
G. DYANN THOMAS	(OBJ)...PRO/PER

GENERAL INFORMATION

Continued from **03/10/16, 10/13/16, 01/12/17, 04/20/17, 06/29/17 and 09/07/17**. Citation issued to Conservator Gloria Thomas.

Continued from 12/07/17 Court cites Gloria Thomas to be present at next hearing, should she failed to appear a bench warrant may be issued for her arrest. Citation issued to Gloria Dyann Thomas and OSC re why she failed to appear/file documents and accounting.

THIS CASE SET FOR HEARING ON Compliance Review/Accounting review.

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

1. Gloria Tomas, sister, appointed conservator of the person and estate on 09/10/15, \$0 bond. Notice of Withdrawal of attorney filed 01/13/16.
2. Determination of Conservatee's Appropriate Level of Care form GC-355 and Care Plan filed 01/20/15.
3. **Need** proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's rights per Pr.C.§1830(c). **(filed prematurely on 06/10/14 prior to appointment, need post notice)**.
4. **Need** final Inventory & Appraisal per Pr.C.§2610.
5. **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
6. Petition to dispense accounting returned for corrections by examiner on 04/27/17. **Need** accounting/waiver.

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.
8. Declaration of unsuccessful service of citation for Gloria Thomas filed.

RECOMMENDATION

Need to clear notes 3-7. When documents are not filed as ordered, court may set a hearing in accord with Pr.C. §2655.

(lc/ww/lc/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/19/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400167

CASE NAME: MTR BRIAN MCGINNIS

SEE ALSO 16

HEARING:

Accounting Review by ***

COUNSEL:

THERESA MCGINNIS	(CPE)...SAMUEL CROWE & ASSOCIATES
PETER MCGINNIS	(CPE)...SAMUEL CROWE & ASSOCIATES
BRIAN MCGINNIS	(CEP)...LENITA A SKORETZ
GLORIA DYANN THOMAS	(PCR)...BRIAN G THORNE
BRIAN MCGINNIS	(PCE)...PRO/PER
G. DYANN THOMAS	(OBJ)...PRO/PER

See notes on previous matter #16.

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

DATE: 03/19/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600177

CASE NAME: ARNETTA BROOKS

HEARING: Accounting Review by Alesia Diggs***

COUNSEL:

ALESIA SONYA DIGGS (PET)...PRO/PER
ARNETTA BROOKS (CEP)...MITCHELL I ROTH

GENERAL INFORMATION

Continued from 11/27/17 Court determines Norvella Brooks is the successor trustee of the estate and takes jurisdiction over the 210 Arnetta Brooks Revocable Trust. A new probate case is to be opened with this trust and be set to trail this matter. Court order a copy of the \$375 bond taken out with Bond Services and a copy of the escrow settlement statement be filed and served by 12/01/17. Counsel agree to accept service by email or fax. Court determines accounting on the conservatorship is dependent upon the accounting of the trust. Ms. Koretz reports a deceased sister has a will that will be probated in San Francisco. The Court sets receipt of bond of \$375,000 in the trust matter. Said bond was filed prior to the setting of the bond hearing. Bond hearing not set. Accounting in trust matter to be set to trail this hearing.

THIS CASE SET FOR HEARING ON Accounting review by Alesia Diggs

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

1. Alesia Diggs, appointed temporary conservator of the person and estate on 07/07/16, no bond. Thereafter appointed general conservator of the person and estate on 09/19/16, \$20,000 bond. **Need general order and letters.**
2. **Need** copy of the escrow settlement statement as directed by Court on 11/27/17.
3. **Need** to file a probate for trust matter as directed by Court on 11/27/17.
4. **Need** Inventory and Appraisal per Pr.C. §2610.
5. **Need** proof of service of Inventory and Appraisal including Instructions for Objection per Pr.C. § 2610.
6. **Need** notice of death of conservatee per Pr.C. §2361.
7. **Need** 1st and Final and post death Accountings beginning with 07/07/16.
8. Trustee Bond in the amount of \$375,000 filed 11/27/17.

RECOMMENDATION

Need to clear notes 2-7. Inquire status of accounting.
(cs)

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

DATE: 03/19/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600308

CASE NAME: MTR OF JASON COLE SEDWAY

HEARING:

Accounting Review by ***

COUNSEL:

ANDREA RAFT	(CP)...PRO/PER
JASON COLE SEDWAY	(CTP)...DONNASUE ORTIZ
INLAND COUNTIES REG CNTR	(PET)...LAYNE A BARTHOLOMEW

GENERAL INFORMATION:

Andrea J. Sedway aka Andrea J. Raft appointed limited Conservator of the person on 05/29/85 in L.A. County.

THIS CASE SET FOR HEARING ON Accounting review by Inland Counties Regional Center

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

1. Inland Regional Center was appointed conservator, of the estate only, on 01/09/17, \$60,000 bond.
2. Need 1st Account beginning with 01/09/17.
3. Need Final Inventory and Appraisal.

RECOMMENDATION:

Inquire status of accounting.
(cs)

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

DATE: 03/19/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600339

CASE NAME: PATRICK BOYD DAHL

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of DAVID K DAHL

COUNSEL:

DAVID K DAHL	(PET)...PRO/PER
MARLENE P DAHL	(PET)...PRO/PER
PATRICK BOYD DAHL	(CEE)...JAMES B CHURCH

GENERAL INFORMATION:

Continued from **10/25/17**.

Continued from 12/27/17 at request of Court. Counsel will assist petitioner in preparing compliance documents. Counsel reports a petition adding a granddaughter as co-conservator may be filed.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. David and Marlene Dahl, parents, appointed limited co- conservators of the person only on 03/22/17.
2. **Need** Notification of Conservatee's rights per Pr.C.§1830(c).
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION:

Need to clear notes 2-4.
(ww/lh/cs)

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

DATE: 03/19/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700427

CASE NAME: GHADEER MOHAMMED MOHSIN

HEARING:
Petition for Appointment of Conservator

COUNSEL:
LATEEFAH MUSLIM ALI SAXON (CP)...PRO/PER
GHADEER MOHAMMED MOHSIN (CTP)...SANDY L. TURNER

GENERAL INFORMATION

Continued from 12/27/17 to clear notes and IRC Report. Due to time constraints in filing for a passport for proposed conservatee an ex parte requesting temporary conservatorship may be filed.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Lateefah Saxon, mother

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

1. Letter from IRC filed 12/14/17 requests an additional 30 days to file report due to improper notice received.
2. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract.
3. Petitioner seeks additional orders to obtain a passport for proposed conservatee to travel to foreign countries for legal necessities and vacation not to exceed 30 days. JTD
4. Petitioner seeks medical powers. **Need** Capacity Declaration.
5. Proposed conservatee is developmentally disabled. Report of Counsel Sandy Turner filed 01/08/18.
6. Proposed conservatee is developmentally disabled. **Need** IRC report.
7. List of Required Contact Information filed 11/20/17 is missing Mohammed Mohsin, father. **Need** completed form.
8. **Proof of Service of Notice by mailed filed 12/07/17; however, need at least 30 days' notice to Inland Regional Center per Pr. C. §1461.4. JTD**
9. Certificate of Completion of the Conservatorship Training Class filed.
10. CI report filed 12/12/17.

11. Return of Citation filed 12/07/17.
12. ~Proposed Form Order: 11/20/17

RECOMMENDATION

Need to clear notes 4, 6-8. If approved, set hearing for Compliance Review for **06/03/19** 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/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/19/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700428

CASE NAME: RIGOBERTO LOPEZ SANCHEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ROSA SANCHEZ LOPEZ (CP)...PRO/PER
RIGOBERTO LOPEZ SANCHEZ (CTP)...CANDICE A GARCIA-RODRIGO

GENERAL INFORMATION

Continued from 12/27/17 to clear notes, report of counsel and for IRC report
THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator
person only by Rosa Lopez, mother

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

1. Letter from IRC filed 12/14/17 requests an additional 30 days to file report due to improper notice received.
2. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract. JTD
3. Certificate of Completion of the Conservatorship Training Class filed 02/01/18.
4. Proposed conservatee is developmentally disabled. **Report of Counsel Candace Garcia-Rodrigo filed 03/08/18.**
5. Petitioner seeks medical powers. **Need** Capacity Declaration.
6. Proposed conservatee is developmentally disabled. **Need** IRC report.
7. List of required contacts is missing Eutiguio Lopez, father. **Need** completed form.
8. **Need** notice of hearing and proof of service.
9. **Need** return of Citation.
10. **CI Report filed 12/15/17.**
11. ~Proposed Form Order: 11/22/17

RECOMMENDATION

Need to clear notes 5-9. If approved, set hearing for Compliance Review for **06/03/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.
(lh/cs)

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

DATE: 03/19/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800037

CASE NAME: BETTY J SCOTT

HEARING: Petition for Appointment of Conservator

COUNSEL:

RONALD A SCOTT (CP)...LAYNE A BARTHOLOMEW
KELLY M KOPECEK (CP)...LAYNE A BARTHOLOMEW
BETTY J SCOTT (CTP)...DONNASUE ORTIZ

GENERAL INFORMATION

Temporary orders granted to Ronald Scott and Kelly Kopecek of the person on 02/13/18. Counsel notes Betty Scott is currently housed at Silverado but when she is less combative it is the parties' intention to move her closer to her home. Donnasue Ortiz was previously appointed as counsel for Betty Scott.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, of the person only, by Petitioners Ronald Scott (spouse) and Kelly Kopecek (cousin)

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

1. No Bond- Person only.
2. Petitioner seeks medical powers. Capacity Declaration filed 02/06/18.
3. Petitioner seeks dementia powers. **Need** report of Donnasue Ortiz, Court appointed counsel.
4. Confidential Screening forms filed; however, item 18 of each form is not completed. Need same.
5. Need return of Citation.
6. Need notice of hearing and proof of service.
7. Health Care Directive filed with Confidential Supplemental Information.
8. Need Court Investigator report.
9. ~Proposed Form Order: 02/06/18

RECOMMENDATION

Need to clear notes 3-6. If approved, set hearing for Compliance Review for 10/22/18 for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(cs)