



Second/Final Check

Superior Court of California

County of San Bernardino

Probate Department

S37

Probate Notes for Calendar Date: 03/20/18

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.

nb0301/0314

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: 03/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1401042

CASE NAME: Robert Charles Fitzpatrick

HEARING:

Hearing re Final Discharge

COUNSEL:

JEFFREY FITZPATRICK (PET)...MARIELLEN ROSS

ROBERT CHARLES FITZPATRICK (DEC)...

VACATED – signed final discharge order forwarded for processing.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500620

CASE NAME: GARY JAMES HITCHCOCK SR

HEARING:

Hearing re Final Discharge

COUNSEL:

GARY JAMES HITCHCOCK SR

(DEC)...

JILL MOLINA

(PET)...CHRISTOPHER B JOHNSON

GENERAL INFORMATION:

Continued from 01/30/18. Court notes it will accept declaration with copy of check in lieu of receipt.

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order on Waiver of Final Account entered 02/14/17.
2. Receipts filed.
3. ~Ex-Parte Petition/Order for Final Discharge.

RECOMMENDATION:

RFA.

(nb)

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

DATE: 03/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500701

CASE NAME: FRANK PELLEGRINO JR

HEARING:

Second Amended Account and Report of DORIS NEUHAUS and Petition
for allowance of fees filed.

COUNSEL:

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

Waiver of Court Fees and Costs filed by FRANK PELLEGRINO is GRANTED
Waiver of Court Fees and Costs filed by MARY LOUISE PELLEGRINO is GRANTED
Waiver of Court Fees and Costs filed by DORIS NEUHAUS is GRANTED
TOTAL FEES WAIVED TO DATE: \$3995.00

XREF: FAMSS1703685 (Mary L Pellegrino-n-Frank Pellegrino Jr)

GENERAL INFORMATION

Continued from **08/30/17**. Court orders Doris Neuhaus to serve and file a complete
accounting by 4:00pm on 12/11/17.

Continued from 01/10/18. Register of actions reflects 2nd acct set 3/20/18

THIS CASE SET FOR HEARING ON **Second Amended Trust Account** (12/11/17)
and Report by Doris Neuhaus, Successor Trustee.

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

1. **Accounting period 06/08/15 – 12/11/17.**
2. **Assets on Hand \$0.00.**
3. **Current bond of \$100,000.**
4. **Petition alleges that all vehicles set forth in the Trust Instrument were repossessed by lienholders and the mobile home was sold prior to Decedent's death. As such, these are not assets of the Trust subject to administration.**

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. The accounting does not appear to properly comply with Pr.C.§16063 and Pr.C.§1060 et. seq.
 - a. Need a proper summary of account and additional accounting schedules under Pr.C. § 1063 [liabilities etc].
 - b. Beginning assets do not coincide with any assets listed in the report [Acct. 05/10/17 LFpg3].
6. Need Notice of Hearing and proof of service.
7. **Objections and response filed by Mary Pellegrino on 06/29/17.** Proof of Service filed 08/21/17.
8. **Response to Objections filed by Doris Newhaus on 12/11/17.**
9. **Points & Authorities in Response to Objections by Mary Louise Peligrino to First Amended Report filed 12/11/17.**
10. **Objections filed by Mary Louise Pellegrino on 01/03/18.**
11. **Objections and Response to Second Amended Accounting with p's & a's in support filed 02/28/18 by Mary Louise Pellegrino.**

RECOMMENDATION

Need amended accounting to be set on first check calendar no sooner than **05/03/18**. Summary of Account does not balance. In addition, charges and credits do not appear to be properly presented per Pr. C. § 1061(b). It cannot be determined whether or not this accounting balances. Need to file proper accounting to comply with Pr.C. §1060. (lc/lh/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601200

CASE NAME: MTR BURNS ELMER LANGDON

HEARING:

first & final Account and Report of SHELANDA LANGDON and
Petition for allowance of fees filed.

COUNSEL:

BURNS ELMER LANGDON	(DEC)...
BURNS T LANGDON	(TP)...BYRON D GROVES
SHELANDA LANGDON	(PET)...NEIL J DE LEON

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Administrator of the Estate Shelanda Langdon ["Petitioner-daughter-in-law"].

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

1. Accounting period 03/20/02 to 11/31/17.
2. Assets on Hand \$140,731.49 consisting of cash.
3. Current bond of \$160,000.
4. Statutory fees of \$5,893.00 requested. Calculated.
5. Attorney requests extraordinary fees of \$2,262.50 for services rendered in connection with the sale of real property. Billed at \$350/hour for 5.4 hours' attorney time and \$125/hour for 3.5 hours' paralegal time. Itemized [LF, pgs. 18-20].
6. Petitioner requests authority to withhold \$4,000 as a reserve.
7. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for **03/26/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700452

CASE NAME: MTR OF JUAN J DAVILA JR

HEARING:

Petition for PROBATE OF THE LOST WILL AND ACCOMPANYING TRUST
INSTRUMENT

COUNSEL:

JUAN J DAVILA JR	(DEC)...
LAURA A QUIGLEY	(PET)...MATTHEW E SHEASBY
NATASHA MARIE AGUIRRE	(PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by NATASHA MARIE AGUIRRE is GRANTED
Request for Waiver of Court Fees and Costs filed by LAURA A QUIGLEY is GRANTED

GENERAL INFORMATION:

Continued from 01/02/18. Attorney Aysha Yousuf indicates that the petition filed September 26, 2017 was an amended petition. Court deems that the petition filed September 26, 2017 supercedes the petition filed May 11, 2017. Hearing on 5/11/17 petition is off calendar.

THIS CASE IS SET FOR HEARING ON **Amended (01/19/18)** Petition for Probate of Lost Will and **for Letters Testamentary** by girlfriend, Laura Ann Quigley ["Petitioner"-named executrix].

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

1. Laura A. Quigley is also a petitioner in the following matter #2A. Question the status of Petition for Letters of Administration with full authority under IAEA by fiancé and step-daughter, Laura Quigley and Natasha M. Aguirre? Court to inquire.
2. Declaration re Lost Will filed in the form of a Petition for Probate of Lost Will on 09/26/17 indicates signed copies of the Will [LF, p10] and Trust documents [LF, p. 16-34] have not been found. Declaration indicates decedent met with Gregory McCloskey in order to have a Will and Trust documents prepared; that Mr. McCloskey was in regular contact with the decedent prior to his death; and at no point did the decedent express a wish to amend or change the Will or Trust Terms [LF, p. 92]. Petitioner further proffers an Individual Quitclaim Deed

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.**

[LF, p. 90] relinquishing title in his individual capacity, to decedent as Trustor and Trustee of The Davila Family Trust dated February 17, 2011.

3. Will waives bond. Estimated value of estate \$200,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. §8481(c). JTD.
4. ~Proposed Order 01/19/18.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **05/28/19**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.
(nb)

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

DATE: 03/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700811

CASE NAME: MTR OF: PRISCILLA ANN DELGADO

HEARING:

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

COUNSEL:

PRISCILLA ANN DELGADO (DEC)...
ROBERT FIERRO (PET)...BRIAN J HOLOHAN

GENERAL INFORMATION:

Continued from **11/14/17** at request of counsel. Counsel states Albert Delgado is brother of the Decedent.

Continued from 12/26/17 and 01/30/18 at request of counsel.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by son, Robert Fierro ["Petitioner"].

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

1. Petitioner alleges that petitioner is the sole heir and waives bond. Estimated value of estate is \$184,500. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c).
2. Proof of publication filed.
3. Summons issued as to an Albert Delgado who is not included in Section 8 to petition. **Need section 8 to include all relatives to the second degree.**
4. Notice filed 09/13/17 is the wrong type of notice. **Need Notice of Petition to Administer Estate with proof of service to Albert Delgado and anyone added to Section 8 of petition.**
5. ~Proposed Form Order/Letters 08/11/17.

RECOMMENDATION:

Need to clear notes 3-4 then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **03/26/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

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

DATE: 03/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1701142

CASE NAME: REEDY DEREK HALL

HEARING:
Hearing Re: RESTRAINING ORDER

COUNSEL:
LELA MARIA HALL (PET)...MICHAEL C MADDUX
REEDY DEREK HALL (DEC)...

Request for Waiver of Court Fees and Costs filed by LELA MARIA HALL is GRANTED

Temporary restraining order in effect pending next hearing of March 20, 2018. Attorney Michael Maddux to provide Attorney Jennifer Jana the information re the lien (solar panels) by 4pm, January 30, 2018.
(nb)

Future Hearing:
03/05/19 Accounting Review.

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800132

CASE NAME: DOROTHY CISNEROS

HEARING:

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

COUNSEL:

DOROTHY CISNEROS (DEC)...

KRISTA CISNEROS (PET)...ROBBINS & HOLDAWAY

GENERAL INFORMATION:

Ex Parte orders granted on 02/14/17, full authority, \$50,000 bond.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by daughter, Krista Cisneros ["Petitioner"].

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

1. Petitioner requests bond be fixed in the amount of \$50,000. Appears sufficient. If approved, need bond of \$50,000 for the general appointment.
2. Duties and Liabilities of Personal Representative form is not dated. Need same.
3. Need proof of publication.
4. ~Proposed Form Order/Letters 02/13/18.

RECOMMENDATION:

Need to clear notes 1-3, \$50,000 bond. If approved, set future hearing for Accounting/Status Review on **05/28/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 03/20/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1701130

CASE NAME: MTR OF THE PETIT FAMILY LIVING TRUST

SEE ALSO 10

HEARING:

Hearing Re: Second Amended pet to determine validity etc

COUNSEL:

AUDREY GEBHART-PETIT	(PET)...MICHAEL P. NEWMAN
DENISE BABCOCK	(PET)...MICHAEL P. NEWMAN
FRANK A PETIT	(PET)...MICHAEL P. NEWMAN
JULIE CARUSO	(PET)...MICHAEL P. NEWMAN
LORI PETIT	(PET)...MICHAEL P. NEWMAN
LYNN PETIT	(PET)...MICHAEL P. NEWMAN
THE PETIT FAMILY LIVING TRUST (TRU)...	
YVETTE PETIT	(PET)...MICHAEL P. NEWMAN

Currently under review by Legal Research.

(LR)

Notice given.

(nb)

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

DATE: 03/20/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1701130

CASE NAME: MTR OF THE PETIT FAMILY LIVING TRUST

SEE ALSO 9

HEARING:

Hearing Re: first amended petition to determine validity

COUNSEL:

AUDREY GEBHART-PETIT	(PET)...MICHAEL P. NEWMAN
DENISE BABCOCK	(PET)...MICHAEL P. NEWMAN
FRANK A PETIT	(PET)...MICHAEL P. NEWMAN
JULIE CARUSO	(PET)...MICHAEL P. NEWMAN
LORI PETIT	(PET)...MICHAEL P. NEWMAN
LYNN PETIT	(PET)...MICHAEL P. NEWMAN
THE PETIT FAMILY LIVING TRUST (TRU)...	
YVETTE PETIT	(PET)...MICHAEL P. NEWMAN

Currently under review by Legal Research.
(LR)

See prior matter #9.
(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/20/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1701303

CASE NAME: MTR OF ALBERT A HERMANN'S TRUST

HEARING:

Petition for Order confirming Trust's title to Real Property

COUNSEL:

ALBERT A HERMANN'S TRUST (TRU)...

DANIEL HERMANN'S (PET)...CHRISTOPHER R ABRAMS

Currently under review by Legal Research.
(LR)

Notice:

Notice filed on 01/11/18 does not give 30 days' notice or include Michael Hermann's.
Need proper service.
(nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

DATE: 03/20/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500161

CASE NAME: MTR OF ELVIRA ALBURJAS

SEE ALSO 13

HEARING:

Hearing Re: REVIEW & PTN for Conservatorship of Person/Estate

COUNSEL:

BEATRIZ TRAVERSO	(OBJ)...DAVID P COLELLA
BEATRIZ TRAVERSO	(PET)...PRO/PER
ELVIRA ALBURJAS	(CEP)...MATTHEW E SHEASBY
MARIA YOLANDA DENNY	(CPE)...JAMES A HAGAN
ROBERT DENNY	(CPE)...JAMES A HAGAN

GENERAL INFORMATION

Ex-parte 6/17/15 Attorney Matthew Sheasby appointed. This matter was filed by spouse in **CONPS1500030**, a case which was dismissed. After hearing the moving documents were transferred to this case number and are to be treated as a new filing. BEATRICE TRAVERSO's durable power of attorney and general power of attorney are suspended. BEATRICE TRAVERSO is to have no access to any accounts or monies that have ELVIRA ALBURJAS's name attached to them. If \$81,000 is released to ELVIRA ALBURJAS, that money is to be placed in Mr. Sheasby's client trust fund account immediately. Objectors advised written objections and competing petitions need to be filed. The Court orders that MARIA DENNY be allowed daily visitation with proposed conservatee. The Court finds that a paid professional fiduciary is needed in this case temporarily, and continues matter for counsel/parties to contact a paid professional fiduciary to determine who will accept appointment.

Ex-parte 7/1/15 Parties report that none of the paid professional fiduciaries contacted are willing to accept this case. Court finds that co-petitioner, MARIA DENNY, is unable to care for proposed conservatee at this time. Court reinstates BEATRIZ TRAVERSO's Power Of Attorney to enable her to pay the bills/handle the affairs of proposed conservatee. Court reinstates its previous order that should the CalPERS funds be released they are to be immediately placed in Mr. Sheasby's client trust fund account. Court orders that conservatee's children are to have unrestricted private visitation with her. Caregiver may be present during visitation.

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.

08/12/15 Beatriz Traverso was appointed Conservator of person. Court also preferred bond of \$90,000; which has posted. Any expenditures exceeding \$500 on a daily basis/\$2,500 for monthly basis are to be submitted to Counsel Matthew Sheasby for approval.

Continued from **11/5/15, 01/27/16 and 04/11/16**. The Court is advised there is a related civil matter pending in case **#CIVDS1511136**.

Continued from **07/12/16 and 09/27/16**.

Continued from **01/26/17**. Court makes disclosure on record; counsel present, have no objection to court hearing matter today.

Continued from 04/25/17 and 08/18/17. Court sets trial dates and gives instructions. Counsel state they understand the Court's orders.

THIS CASE IS SET FOR HEARING ON Review and Petition for Conservatorship of Person/Estate.

- Petition for Conservatorship, person and estate, by daughter & son-in-law (Maria/Robert Denny)
- Petition for Conservatorship, person and estate, by daughter (Beatriz Traverso)

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

Petition for Conservatorship previously filed by spouse (Carlos Alburjas) and dismissed without prejudice under **CONPS1500030**. Court is aware.

Petition by daughter & son-in-law (Maria/Robert Denny):

1. Petitioner requests bond waived as the estate qualifies as a small estate under Pr.C. §§2628, 2323 [if public benefits]. Court may wish to inquire the necessity of estate powers. Alternatively, bond may be waived. JTD
2. Medical and dementia powers sought. Capacity Declaration filed 6/30/15 by competing petitioner. JTD
3. Need List of Required Contact Information form (Local form SB-12224).
4. Need return of Citation.
5. Need notice of hearing and proof of service.
6. Need proof of completion of conservatorship class.
7. ~Proposed form order: 6/10/15

Petition by daughter (Beatriz Traverso):

8. Petitioner requests bond waived as the estate qualifies as a small estate under Pr.C. §§2628, 2323 [if public benefits]. Court may wish to inquire the necessity of estate powers. Alternatively, bond may be waived. JTD
9. Petitioner, Beatriz, is named agent in fact for proposed conservatee. Durable Power of Attorney attached [6/30/15 Petition LF p.12-16].
10. Medical and dementia powers sought. Capacity Declaration filed 6/30/15.
11. Petitioner requests dementia powers. Report of Counsel Sheasby, filed 7/17/15.
12. Citation returned served.

13. Proof of service of Notice filed 7/21/15 includes service on a James Hagan. As this person is not listed in the petition, Court may wish to inquire as to the relationship.
14. Proof of completion of conservatorship class filed 7/17/15.
15. Court Investigator report filed 8/6/15.
16. ~Proposed form order: 6/30/15.

RECOMMENDATION:

Matter is contested; need to clear notes. If approved, set hearing for Compliance Review for **03/21/17** 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 and Inventory & Appraisal with notice.

Set hearing re: Accounting Review for **05/28/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.
(sa/cbr/sa/dl/nb/lc/lh/nb)

Future Hearing:

- 04/16/18 Court Trial
- 04/17/18 Court Trial
- 04/18/18 Court Trial
- 04/19/18 Court Trial
- 04/20/18 Court Trial

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/20/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500161

CASE NAME: MTR OF ELVIRA ALBURJAS

SEE ALSO 12

HEARING:

Readiness Calendar

COUNSEL:

BEATRIZ TRAVERSO

(OBJ)...DAVID P COLELLA

BEATRIZ TRAVERSO

(PET)...PRO/PER

ELVIRA ALBURJAS

(CEP)...MATTHEW E SHEASBY

MARIA YOLANDA DENNY

(CPE)...JAMES A HAGAN

ROBERT DENNY

(CPE)...JAMES A HAGAN

No notes – Readiness.

(nb)

Future Hearing:

04/16/18 Court Trial

04/17/18 Court Trial

04/18/18 Court Trial

04/19/18 Court Trial

04/20/18 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: 03/20/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500203

CASE NAME: OSCAR J HAALAND JR

HEARING:

Petition for approval and payment of attorney's fees to court
appointed counsel for conservatee

COUNSEL:

ALICE EVANS	(CPE)...PATRICIA A LOBELLO
ALICE EVANS	(PET)...PATRICIA A LOBELLO
MITCHELL I. ROTH	(PET)...MITCHELL I ROTH
OSCAR J HAALAND JR	(CTE)...MITCHELL I ROTH
OSCAR J. HAALAND	(CEP)...MITCHELL I ROTH

XREF: CONPS1500202 (Ruby B Haaland)

GENERAL INFORMATION:

Conservatee passed away on 11/01/17.

THIS CASE IS SET FOR HEARING ON Petition for fees and compensation by Court-Appointed Counsel, Mitchell I. Roth ["Petitioner"].

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

- 1 Petitioner was appointed on 08/06/15. Petitioner alleges that services have been rendered for which counsel has not been compensated for the period 08/10/15 to 02/12/18.
- 2 Attorney requests fees of \$18,937.50. Billed at \$375/hour for 50.5 hours' attorney time. Itemized [LF, pgs. 8-23]. JTD.
 - a. Does not comply with Local Rule 20-1402(b) as fee request exceeds two years. JTD.
- 3 Petitioner requests the Court order Conservator of the Estate, Alice Evans, to pay requested fees, forthwith.
- 4 ~Proposed Order 02/14/18

RECOMMENDATION:

Court's discretion.

(nb)

Future Hearing: 03/28/19 Accounting Review.

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Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/20/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500221

CASE NAME: Gerald Brown

SEE ALSO 16

HEARING:

Hearing Re: Status Re: Reimbursement for Gerald Brown

COUNSEL:

GERALD BROWN

(CEP)...WALTER T. MOORE

HAROLD FLETCHER

(PET)...PRO/PER

HORACE WALLACE

(PET)...PRO/PER

No notes –Status.

(nb)

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

DATE: 03/20/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500221

CASE NAME: Gerald Brown

SEE ALSO 15

HEARING:

Accounting Review by ***

COUNSEL:

GERALD BROWN	(CEP)...WALTER T. MOORE
HAROLD FLETCHER	(PET)...PRO/PER
HORACE WALLACE	(PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review by Temporary Conservator of the Person and Estate, Harold Fletcher.

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

1. Need First and Final Account beginning 09/24/15 (date of appointment) to 06/02/16 (date oral motion to withdraw estate powers).
2. No accounting. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/20/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700191

CASE NAME: TIMOTHY STAHL

SEE ALSO 22

HEARING:

Hearing Re: TWO COMPETING PETITIONS FOR CONSERVATORSHIP

COUNSEL:

INLAND COUNTIES REGIONAL CENTE	(CPE)...LAYNE A BARTHOLOMEW
JOHN KEVIN STAHL	(CPE)...STEVEN K BECKETT
MARY ANN GOLDBERG	(OBJ)...KYLE E WOOLDRIDGE
MARY ANN GOLDBERG	(PET)...FULLERTON LEMANN
TIMOTHY STAHL	(CEP)...JENNIFER M DANIEL

GENERAL INFORMATION

Ex parte hearing held 05/30/17. Inland Regional Center objects to the petition for conservatorship. Inland Regional Center to file competing petition by 07/18/17. Ex parte orders denied. Attorney Jennifer M. Daniel is appointed for Timothy Stahl. Court appoints Attorney J David Horspool as the Guardian Ad Litem for Timothy Stahl.

Continued from 07/18/17. Steven Beckett indicates that the father has contacted them and reports that father may consider having their recent petition amended to include him as a proposed co-conservator of Timothy Stahl. Court reset date of petition on 10/18/17 to 10/17/17. Amended petition to be filed by 10/03/17 or it will be deemed waived. Court sets trial dates with estimate of 1 week. Court makes Pretrial Orders.

Ex parte orders granted on **09/14/17**. Court appointed Inland Regional Center as temporary conservator of the person only.

Continued from 10/17/17 at request of counsel. Court directs that Inland Counties Regional Center is to submit a report to the court but is excused from making a recommendation as to who should be appointed as conservator of Timothy Stahl as IRC is a petitioner in this case. Notice waived.

Continued from 01/30/18. Court signs stipulation & agreement re: visits.

THIS CASE SET FOR HEARING ON

- Petition #1 [filed 05/23/17] for Appointment of Conservator person only **by Mary Ann Goldberg**

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.

- Amended Petition #2 [filed 08/22/17] for Appointment of Conservator of person only by **IRC and John Kevin Stahl (father)**

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

Petition #1 by Mary Ann Goldberg

1. Proposed conservatee is developmentally disabled. It appears a Petition for Limited Conservatorship is appropriate.
2. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, an IRC report is optional per Pr.C. 1827.5(b). Does court wish to require? JTD
3. Petitioner seeks orders that conservatee be adjudicated to lack the capacity to make medical decisions under Pr. C. §2355. JTD
4. Petitioner seeks medical powers. **Need** Capacity Declaration.
5. Petition alleges Mary Ann Goldberg (petitioner/mother) was appointed conservator of Timothy Stahlwas (proposed conservatee) in Suffolk County, New York on 05/30/97, index no: 4947/97. **Supp. filed 07/18/17. Conservatee was flown to Palm Springs, CA on 06/29/14. Need copy of Suffolk County Court Order fixing residence in California.**
6. **Need** report of J David Horspool, GAL.
7. **Need** return of Citation.
8. **Need** Notice of Hearing and Proof of Service.
9. Certificate of Completion of the Conservatorship Training Class filed
10. CI Report filed 07/13/17.
11. Report of Jennifer Daniel filed 09/13/17.
12. Supporting Declaration of Carole Lieberman, M.D.M.P.H. filed 09/14/17.
13. ~Proposed Form Order: 05/23/17

Amended Petition #2 by IRC and John Kevin Stahl (father)

14. Petitioner seeks powers re habilitation, treatment, training, medical etc under Pr. C. §2351.5. JTD
15. Petitioner seeks civil rights be limited. JTD
16. Petitioner seeks medical powers. Capacity Declaration filed 08/25/17.
17. Proposed conservatee is developmentally disabled. **Need** report of Counsel Jennifer Daniel as to general petition.
18. Proposed conservatee is developmentally disabled. **IRC report filed.**
19. Certificate of Completion of the Conservatorship Training Class filed.
20. Return of Citation with Proof of Personal Service filed 08/25/17; however, proof of service is incomplete as to date and time of service. Amended proof of personal service filed 10/12/17.
21. Special Report by Court Investigator filed.
22. **Objection of Mary Ann Goldberg filed 09/08/17 with proof of service.**
23. ~Proposed Form Order: 08/22/17

RECOMMENDATION

Matter is contested.

Need to clear notes 4-8; 17-18. If approved, set hearing for Compliance Review for **10/23/18** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C. §1830(c); Level of Care and Care Plan per Pr.C. §2352.5
(lh/nb)

Future Hearing:

07/24/18 Readiness calendar

08/20/18 Court Trial

08/21/18 Court Trial

08/22/18 Court Trial

08/23/187 Court Trial

08/24/18 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: 03/20/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700420

CASE NAME: MTR OF STEPHANIE ALICIA ORTEGA

HEARING:

Hearing Re: CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:

ARLENE M SWEET	(CP)...PRO/PER
EVELYN M JENSEN	(CP)...PRO/PER
ROSANNE DANFORD	(CP)...PRO/PER
STEPHANIE ALICIA ORTEGA	(CTP)...JOHN L. GORDON

GENERAL INFORMATION:

Order appointing Rosanne Danford (mother), Arlene M. Sween and Evely M. Jensen Limited Co-Conservators entered 06/24/10.

Continued from 01/16/18. No appearance. Court orders conservator (and if they have counsel, the counsel for the conservator) to be personally present at 9:30am on March 20, 2018. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON CMC re Transfer in from LA County.

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

1. Need amended letters.
2. Last Capacity Declaration filed 04/30/10 in LA County. Does Court wish to require an updated capacity declaration? JTD.
3. Last CI Report filed 06/28/17 in LA County. Need CI Report.
4. Conservatee is developmentally disabled. Need appointment of counsel and report by same.
5. Need IRC report.
6. Need a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).
7. Need to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).
8. **Declaration by John L. Gordon indicates he is no longer conservatee's attorney; was discharged by LA Court; and will not be appearing at hearing.**

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.

RECOMMENDATION:

Need to clear notes 1-7 then Court's discretion.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/20/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700442

CASE NAME: MTR OF DUANE R SHIER

HEARING:

Hearing Re: CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:

DUANE R SHIER

(CTP)...

DUANE SCOTT SHIER

(CP)...JOHN R GRIJALVA

GENERAL INFORMATION:

Duane Scott Shier appointed Conservator of the Person on 01/10/17.

Continued from 01/23/18. Court notes it will not require new court Investigator report, capacity declaration; court will not require appointing counsel for Conservatee. Counsel to file notice of Conservatee's Rights, Amended Letters for San Bernardino County, and Post-Move Notice of Change of Address before next hearing date of March 20, 2018.

THIS CASE IS SET FOR HEARING ON CMC re Transfer-In from Los Angeles County.

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

1. Need Statement of Care Plan in accord with Pr.C. §2352.5.
2. Need a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).
3. ~Proposed Form Letters 02/16/18.

RECOMMENDATION:

Need to clear notes.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/20/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800032

CASE NAME: MTR OF LINDA ROCHELLE SMITH

HEARING:

Petition for Appointment of Conservator

COUNSEL:

BRYAN E JENKINS (CPE)...LAW OFFICE OF REIKO J HICKS

LINDA ROCHELLE SMITH (CEP)

GENERAL INFORMATION

Ex Parte Orders entered 02/22/18, person and estate, no bond. Court signs order terminating power of attorney.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by brother, Bryan E. Jenkins ["Petitioner"].

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

- 1 Petition is not dated or signed by counsel. Need same.
- 2 Petitioner requests no bond as the estimated value of the estate is to be determined. JTD.
- 3 Petitioner requests Pr. C. §2352 powers to fix residence of proposed conservatee within state.
- 4 Petitioner requests powers per Pr. C. §2355 to have exclusive authority to make health care decisions, for the conservatee, that the conservator in good faith based on medical advice determines to be necessary.
- 5 Petitioner requests powers per Pr. C. §2356.5(c) authorizing the administration of medication appropriate for the care and treatment of dementia, upon court's finding.
- 6 Petitioner seeks medical powers. Medical Capacity Declaration affixed to general petition [LF, pgs. 17-20]. Need Dementia Attachment GC-313.
- 7 Petitioner requests dementia powers; report of court-appointed counsel, Donnasue Ortiz, filed.
- 8 Need Court Investigator's Report.
- 9 Need Certificate of Completion re Conservatorship Class.
- 10 Need return of Citation.
- 11 Need Notice of Hearing and proof of service.

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.**

12 ~Proposed Order 02/05/18.

RECOMMENDATION:

Need to clear notes 1, 6-11 then Court's discretion re: bond. If approved, set hearing for Compliance Review for **10/23/18** 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 & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **05/28/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/20/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800043

CASE NAME: MTR OF MILDRED K KUNIYOSHI

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DIANE KUNIYOSHI LOO (CPE)...LAYNE A BARTHOLOMEW

MILDRED K KUNIYOSHI (CEP)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by daughter, Diane Kuniyoshi Loo ["Petitioner"].

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

1. Petitioner requests a bond in the amount of \$830,000 be fixed. Appears sufficient. JTD.
2. Petitioner seeks medical powers. Medical Capacity Declaration filed, Section 3, does not indicate physician has at least 2 years' experience in diagnosing dementia and does not include Dementia Attachment GC-335A. Need same.
3. Petitioner requests dementia powers; **need report by court-appointed counsel, Sandy Turner.**
4. Conservator Screening form, Section 18 re: licensing as PPF is not completed. Need verified supplement.
5. **Court Investigator's Report filed.**
6. Need return of Citation.
7. Certificate of Completion re Conservatorship Class filed.
8. ~Proposed Form Order/Letters 02/09/18.

RECOMMENDATION:

Need to clear notes 2-4, 6; \$830,000.00 bond. If approved, set hearing for Compliance Review for **10/23/18** 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

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.**

per Pr.C. §2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C. §2610; recordation of letters if applicable per Pr.C. §2313.

Set hearing for Accounting Review on **05/28/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 03/20/18 TIME: 9:35 DEPT: S35P

CASE#: CON PS1700191

CASE NAME: TIMOTHY STAHL

SEE ALSO 17

HEARING:

Hearing Re: PETITION TO REMOVE IRC AS TEMPORARY C'TOR, ETC

COUNSEL:

INLAND COUNTIES REGIONAL CENTE	(CPE)...LAYNE A BARTHOLOMEW
JOHN KEVIN STAHL	(CPE)...STEVEN K BECKETT
MARY ANN GOLDBERG	(OBJ)...KYLE E WOOLDRIDGE
MARY ANN GOLDBERG	(PET)...FULLERTON LEMANN
TIMOTHY STAHL	(CEP)...JENNIFER M DANIEL

Currently under review by Legal Research.
(LR)

Future Hearing:

07/24/18 Readiness calendar

08/20/18 Court Trial

08/21/18 Court Trial

08/22/18 Court Trial

08/23/187 Court Trial

08/24/18 Court Trial

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

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PA

DATE: 03/20/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1200415

CASE NAME: MAURICE M BENWARE

HEARING:

Probate status report filed.

COUNSEL:

MAURICE M BENWARE	(DEC)...
NIEKA M BENWARE	(PET)...PRO/PER
PUBLIC ADMINISTRATOR	(SA)...COUNTY COUNSEL
RONDA BENWARE	(PET)...ASHTON R WATKINS
WELLS FARGO BANK, N.A.	(PET)...MARY JEAN PEDNEAU

XREF: CIVRS1203055 (Wells Fargo-v-Ronda Benware et al)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Successor Administrator, Public Administrator ["Petitioner"].

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

1. Petitioner alleges the estate is not in a condition to be closed as the only possible asset in the sum of \$1,000 is held by the State of California, for which, Petitioner filed a claim. There are no assets marshaled by Petitioner belonging to this estate.
2. Petitioner requests an additional 12 months to close the estate.
3. ~Proposed Order 11/30/17.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **11/27/18**.

(nb)

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: 03/20/18 TIME: 1:30 DEPT: S35P

CASE#: VPR VS003101

CASE NAME: MATTER OF THE MC SPICER TRUST

HEARING:

Hearing Re: COURT TRIAL (SECOND 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

Waiver of Court Fees and Costs filed by RANDOLPH WILL STEWARD is GRANTED
TOTAL FEES WAIVED TO DATE: \$525.00

XREF: VPRVS002838 *ESTATE OF MILBRY C SPICER*

No Notes – Court Trial.

(nb)

Future Hearings:

3/19/18-3/23/18 Court Trial

Superior Court of Calif, County of San Bernardino
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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH **PROBATE**

DATE: 03/20/18 TIME: 8:30 DEPT: S36P

CASE#: PRO DS1000524

CASE NAME: SIMON PEPILASCOV & LUISA PEPILASCOV TRUST

HEARING:
Petition for approval & payment of attorney's fees

COUNSEL:
LEIA CHASE (PET)...CHO, SHEASBY, CHUNG & ,
SIMON PEPILASCOV & LUISA PEPIL (TRU)...PRO/PER

XREF: CONDS1000180 (Luisa Pepilascov)
GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Attorney Fees and Costs
Advanced to Court-Appointed Counsel for Conservatee by Mitchell I. Roth
[“Petitioner”].

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

1. Petitioner was re-appointed on 06/14/17 to 09/11/17. Petitioner alleges that services have been rendered for which counsel has not been compensated.
2. Attorney requests fees of \$3,690.00. Billed at the reduced rate of \$300/hour for 12.3 hours' attorney time. Itemized [LF, pgs. 7-10]. JTD.
3. Attorney requests reimbursement of costs advanced of \$131.00. Itemized.
4. Petitioner requests and order directing Successor Conservator/Trustee, Raquel Pepilascov, to pay these fees, forthwith.
5. Petitioner agrees to monthly payments from the Conservator of the Estate/Trustee.
6. Proposed Order 12/28/17 does not include 3 lines of content before signature line.

RECOMMENDATION:
Court's discretion.
(nb)

Superior Court of Calif, County of San Bernardino
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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 03/20/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1401134

CASE NAME: Celia A Ramirez

SEE ALSO 2B, 2C

HEARING:

Hearing Re: REMOVAL OF ADMINISTRATOR

COUNSEL:

CELIA A RAMIREZ	(DEC)...
DEPARTMENT OF HEALTH CARE SERV	(PRO/PER
ERIC B RAMIREZ	(PET)... LINDA ROBERTS-R
ESTHER M DAVID	(PET)...HARTNELL LAW GROUP
ESTHER M DAVID	(TP)...HARTNELL LAW GROUP

Request for Waiver of Court Fees and Costs filed by ERIC B RAMIREZ is GRANTED

GENERAL INFORMATION

Continued from **09/19/16 and 11/28/16**. Court orders an accounting to be filed 12/21/16. Court orders that all monies be placed into a blocked account. All temporary orders to remain.

Continued from **02/06/17 and 04/10/17**. Counsel represent all parties agree to the listing of property for sale. Counsel is to communicate regarding approval of sale.

Continued from 06/26/17 Proof of blocked account has not been filed. Copy of check and proof it was placed into blocked account must be filed by 06/28/17 or administrator will be removed.

Continued from 09/18/17 to hearing pending matters.

Continued from 10/12/17. An oral motion was made to reinstate Eric Ramirez.

Continued from 01/10/18, 01/31/18, 03/06/18, 03/08/18 and 03/13/18.

THIS CASE SET FOR HEARING ON Petition for Removal of Administrator (Eric Ramirez) by Esther M. David, daughter Pr.C. §§ 850, 859, 8500, 8540.

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

1. Letters Testamentary issued to Eric Ramirez on 6/27/16, no bond. (Order appointing was granted 8/21/15.) Eric Ramirez suspended on 08/01/16 and Letters of Special Administration were issued to Esther David, daughter, \$20,000 bond.

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.

2. Petitioner, Esther David, is seeking removal of executor Eric Ramirez. Petitioner alleges that Eric has wrongfully taken, concealed and disposed of property in the estate. Petitioner additionally cites Pr.C. § 859 that Eric be twice liable for assets taken. Grant deed attached to petition showing real property was transferred by Eric as executor to himself [LFpg8].
3. Waiver of Notice filed 11/14/16 by Sylvia Vizcarra, and Jose Juan Ramirez on 11/21/16.
4. Order Voiding Grant Deed 02/06/17.
5. Proof of blocked account filed on 08/22/17.
6. **Objections filed 11/21/16 by suspended administrator, Eric Ramirez.**
7. **Declaration of Juan Ramirez in support of Objections by Eric Ramirez filed on 01/26/17.**

RECOMMENDATION

Matter is contested.

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

Superior Court of Calif, County of San Bernardino
Page: 2B ADD ON
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 03/20/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1401134

CASE NAME: Celia A Ramirez

SEE ALSO 2A, 2C

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS OF
ADMINISTRATION WITH WILL ANNEXED

COUNSEL:

CELIA A RAMIREZ	(DEC)...
DEPARTMENT OF HEALTH CARE SERV	(PRO/PER
ERIC B RAMIREZ	(PET)... LINDA ROBERTS-R
ESTHER M DAVID	(PET)...HARTNELL LAW GROUP
ESTHER M DAVID	(TP)...HARTNELL LAW GROUP

Request for Waiver of Court Fees and Costs filed by ERIC B RAMIREZ is GRANTED

GENERAL INFORMATION

Continued from **11/28/16**.

Ex parte hearing on **01/11/17** for Authority to Administer under IAEA was heard and taken off calendar. Partial settlement was reached at mediation and parties agreed to sell the real property. Counsel to prepare order.

Continued from 02/06/17 and 04/10/17. The Court addresses probate note #2 on the record.

Continued from **06/26/17, 09/18/17, 10/18/17**.

Continued from **01/10/18** at request of parties and request for mediation to be set.

Continued from 01/31/18, 03/06/18, 03/08/18 and 03/12/18.

THIS CASE SET FOR HEARING ON Petition for Probate, **Successor** Letters of Administration WWA with Full Authority under IAEA **by Esther David, daughter.**

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

1. Temporary Letters issued 01/09/17 to petitioner Esther David, daughter.
2. Petitioner Esther David requests no bond and all proceeds of sale to be placed into blocked account. There does not appear to be personal property.
3. **Need** proof of publication.

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.

4. Does Court wish to require the Order on partial settlement that was reached on 01/11/17?
5. ~Proposed Form Order: 07/27/16.

RECOMMENDATION

Need to clear note 3. Prior administrator needs to be removed prior to granting this petition. If approved, set Accounting/Status Review for **05/30/19**. Any account to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

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

Superior Court of Calif, County of San Bernardino
Page: 2C ADD ON
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 03/20/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1401134

CASE NAME: Celia A Ramirez
SEE ALSO 2A, 2B

HEARING:
Accounting Review by ***

COUNSEL:

CELIA A RAMIREZ	(DEC)...
DEPARTMENT OF HEALTH CARE SERV	(PRO/PER
ERIC B RAMIREZ	(PET)... LINDA ROBERTS-R
ESTHER M DAVID	(PET)...HARTNELL LAW GROUP
ESTHER M DAVID	(TP)...HARTNELL LAW GROUP

Request for Waiver of Court Fees and Costs filed by ERIC B RAMIREZ is GRANTED

GENERAL INFORMATION

Continued from **6/21/16** for Eric Ramirez, son, to appear.

On **8/1/16** Eric Ramirez, suspended and Esther David, daughter appointed Special Administrator with authority to file an 850 petition and marshal assets.

Continued from 08/31/16, 09/19/16, 11/28/16, 02/06/17, 04/10/17 and 06/26/17, 09/18/17, and 10/12/17.

Continued from 01/10/18, 01/31/18, 03/06/18, 03/08/17 and 03/13/18.

THIS CASE IS SET FOR HEARING ON Accounting/Status Review (re Eric Ramirez)

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

1. Letters Testamentary issued to Eric Ramirez, son, on 6/27/16, no bond. (Order appointing was granted 8/21/15.) However, as Eric Ramirez, is now suspended and no I&A filed. Court may wish to inquire if any assets were marshaled thus requiring an accounting.
2. Partial Inventory and Appraisal filed 02/06/17 by Eric Ramirez. **Need** a final inventory & appraisal.
3. **Need** an accounting or status report.

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.**

RECOMMENDATION:

Need to clear notes 2-3. 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/sa/lc/nb/ww/lc/lh/nb)

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

Superior Court of Calif, County of San Bernardino

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

DATE: 03/20/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500475

CASE NAME: MIGUEL GALVAN

HEARING:

Probate status report filed.

COUNSEL:

CHRISTINA GALVAN	(PET)...CRAIG M PARKER
MIGUEL GALVAN	(DEC)...
WELLS FARGO BANK, N.A.	(TP)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Executrix Christina Galvan ["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 Petitioner is preparing a Supplemental Inventory with additional items of personal property and needs more time to sell the personal property.
2. Petitioner requests an additional 12 months to close the estate.
3. ~Proposed Order 01/19/18.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **01/22/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/20/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600036

CASE NAME: CARL J HUNT

HEARING:

Probate status report filed.

COUNSEL:

CARL J HUNT

(DEC)...

JEFF HUNT

(PET)...JOHN F WEBER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Administrator, Jeff Hunt ["Petitioner"].

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

1. Petitioner alleges the estate is not in a condition to be closed as the decedent had a barbershop business; did not keep accounting records; and in 2015, the decedent sold a ½ interest in a house he inherited from his mother. Tax preparer is obtaining decedent's tax transcripts and information to prepare (the best she can) and file decedent's final lifetime tax return.
2. Petitioner requests an additional 12 months to close the estate.
3. **Current bond of \$44,000. Declaration filed 01/31/18 requests a decrease in bond to \$10,000 as the real property has been foreclosed and the Toyota Scion was turned over to the lienholder. JTD.**
 - a. **Request for Decrease of Bond should have been filed as a petition.**
4. ~Proposed Order 01/18/18 & 01/31/18

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **01/24/19**.
(nb)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 03/20/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700475

CASE NAME: MTR OF RAYMOND LEON ESCARZAGA SR

HEARING:

FIRST AND FINAL Account and Report of BARBRA CONTRERAS and
Petition for allowance of fees filed.

COUNSEL:

BARBRA CONTRERAS

(PET)...RYAN MICHAEL DARLING

RAYMOND LEON ESCARZAGA SR

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees
by Administrator, Barbara Contreras ["Petitioner"].

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

1. Accounting period 01/04/17 to 01/14/18.
2. Assets on Hand \$155,488.67 consisting of cash.
3. Account indicates proceeds in the amount of \$155,488.67 have been deposited
into attorneys IOLTA account. Question whether this deposit is contrary to the
requirement in Probate Code §9652 that a personal representative keep cash
not reasonably necessary for estate administration into an interest-bearing
account as interest goes to the State Bar? Does Court wish to reduce statutory
fees for both the personal representative and attorney for the lost
interest? JTD
4. Statutory fees of \$6,040.00 requested. Calculated.
5. Need proof of service to Notice of Proposed Action.
6. Petitioner requests authorization to withhold the sum of \$465.00 as a reserve.
7. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear note 5 then Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/20/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700894

CASE NAME: EUGENE L. SMITH

HEARING:

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

COUNSEL:

BRENNITA B. JACKSON (PET)...PRO/PER
EUGENE L. SMITH (DEC)...

GENERAL INFORMATION

Continued from **12/04/17**. Matter referred to Public Administrator for possible appointment.

Continued from 01/23/18 at request of counsel. The Court clears probate note 5, proof of publication filed on 1/16/18. The Court appoints Attorney Craig Parker as GAL for minor Darion Smith.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Brennitta Jackson, fiancé

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

1. All heirs waive bond. Estate value is currently unknown and will be determined. 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. Court to clarify if Cheryl Covington is an ex-wife of decedent as petitioner Brennitta indicates that she was his fiancé.
3. Public Administrator appears to have higher priority per Pr. C. § 8461(p). Court may wish to refer to Public Administrator.
4. As matter may be referred to Public Administrator, court may wish to continue matter to a Tuesday calendar.
5. ~Proposed Form Order: 09/08/17

RECOMMENDATION

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

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

Superior Court of Calif, County of San Bernardino
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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 03/20/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700915

CASE NAME: MTR OF SPERRY A MAXWELL

HEARING:

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

COUNSEL:

BEVERLY JEAN MAXWELL (PET)...PRO/PER
SPERRY A MAXWELL (DEC)...

GENERAL INFORMATION:

Continued from **12/12/17**. The petitioner states the decedent died at San Antonio Community Hospital in Upland, California. Kathleen and Cyndi are daughters and Troy is the son. Court clears these probate notes. Matter is continued for proper notice of petition to administer estate with proof of service. **Continued from 01/23/18 on Court's motion. Notice of Petition to Administer Estate must be on a judicial council form.**

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by spouse Beverly J. Maxwell ["Petitioner"].

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

1. Petition indicates all heirs waive bond. Estimated estate valued at \$152,000. However, **need** Mandatory Waiver of Bond by petitioner. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
2. Section 8 does not include relationship to decedent for items 2-4. **Need** verified supplement.

RECOMMENDATION:

Need to clear notes 1-2 then Court's discretion re bond. If approved, set future hearing for Accounting on **05/28/19**. Any account to be filed 30 days' in advance of hearing.

Note requirements of Local Rules.

(nb)

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

Superior Court of Calif, County of San Bernardino

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

DATE: 03/20/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800066

CASE NAME: MICHAEL LEROY GIROMPINY

HEARING:

Petition to determine succession to Real Property

COUNSEL:

AMANDA MATTINGLY (PET)...JOHN F WEBER
MICHAEL LEROY GIROMPINY (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by nieces Amanda Mattingly and Michelle Mattingly ["Petitioners"].

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

1. Attachment 11 to petition does not include decedent's interest in subject property. Need verified supplement.
2. Inventory & Appraisal attached to petition has the following issues:
 - a. Attachment 2 does not indicate decedent's interest in subject property;
 - b. Attachment 2 does not include character of property.
Need corrected inventory
3. Petitioners request determination that decedent's real property located in San Bernardino County pass to petitioners without administration. Petitioners are decedent's nieces and purported only heirs per intestate succession.
4. ~Proposed Form Order 01/24/18.

RECOMMENDATION:

Need to clear notes 1-2 then Court's Discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/20/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800096

CASE NAME: ELAINE ANN BEAUCLAIR

HEARING:

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

COUNSEL:

ELAINE ANN BEAUCLAIR (DEC)...
RICHARD JACOBS (PET)...JOHN F WEBER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by Executor, Richard Jacobs ["Petitioner"].

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

1. Section 8 to petition does not include Mardy Jacobs, the Trident Society or Mountain View Cemetery named in decedents Will. Need verified supplement.
2. Will is not self-proving. Need Proof of Subscribing Witness.
3. Will waives bond. Estimated estate valued at \$70,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
4. Need proof of publication.
5. Notice filed on 01/31/18 does not include Mardy Jacobs, the Trident Society or Mountain View Cemetery named in decedents Will. Need proper service.
6. ~Proposed Form Order 01/31/18.

RECOMMENDATION:

Need to clear notes, \$70,000 bond. If approved, set future hearing for Accounting/Status Review on **05/28/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino Superior Court

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 03/20/18 TIME: 8:30 DEPT: S36P

CASE#: SPR SS51035

CASE NAME: PHILIP FELIX GARCIA

SEE ALSO 11

HEARING:

Hearing re Final Discharge

COUNSEL:

CALIFORNIA VICTIM COMPENSATION	(PRO/PER
CHRISTINE GARCIA IRISH	(PET)...HUTTON, ADAMS &
CINDY GARCIA-EASTLICK	(BEN)...C. L. FARRELL
CINDY GARCIA-EASTLICK	(TP)...C. L. FARRELL
INTERNATIONAL FIDELITY INSURAN	(PET)...PRO/PER
PHILIP FELIX GARCIA	(DEC)...

XREF: PROPS1100842 (Miquela Macias Garcia)

GENERAL INFORMATION:

Continued from 12/19/17.

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order after Bench Trial Settling First and Final Account of Successor Trustee Cindy Garcia-Eastlick et seq. entered 10/03/17.
2. No receipts. Need same.
3. Need Ex-parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino Superior Court

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 03/20/18 TIME: 8:30 DEPT: S36P

CASE#: SPR SS51035

CASE NAME: PHILIP FELIX GARCIA

SEE ALSO 10

HEARING:

Accounting Review by ***

COUNSEL:

CALIFORNIA VICTIM COMPENSATION	(PRO/PER
CHRISTINE GARCIA IRISH	(PET)...HUTTON, ADAMS &
CINDY GARCIA-EASTLICK	(BEN)...C. L. FARRELL
CINDY GARCIA-EASTLICK	(TP)...C. L. FARRELL
INTERNATIONAL FIDELITY INSURAN	(PET)...PRO/PER
PHILIP FELIX GARCIA	(DEC)...

XREF: PROPS1100842 (Miquela Macias Garcia)

GENERAL INFORMATION:

Continued from **10/03/17** at request of counsel to complete accounting.

Continued from 12/19/17 to file an accounting for Miquela Macia Garcia estate.

THIS CASE IS SET FOR HEARING ON Accounting Review (re Trust)

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

1. Cindy Garcia-Eastlick appointed Interim Successor Trustee per order entered 05/25/16.
2. Per Order entered 07/31/17, Court ordered Cindy Garcia-Eastlick, as Administrator of the Estate to file a First and Final Accounting.
3. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **TRUSTS AND MOTIONS**

DATE: 03/20/18 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1700614

CASE NAME: The Juan and Aurora Acosta 2001 Living Trust

SEE ALSO 13

HEARING:

Hearing Re: MOTION TO STRIKE

COUNSEL:

EVELIA SANCHEZ

OLGA ACOSTA

THE JUAN AND AURORA ACOSTA 200

(OBJ)...KENNETH U REYES

(PET)...ALBREKTSON & SHUMATE,

(TRU)...

Currently under review by Legal Research.

(LR)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 03/20/18 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1700614

CASE NAME: The Juan and Aurora Acosta 2001 Living Trust

SEE ALSO 12

HEARING:

Hearing Re: PTN TO CONFIRM TRANSFER OF ASSETS

COUNSEL:

EVELIA SANCHEZ

(OBJ)...KENNETH U REYES

OLGA ACOSTA

(PET)...ALBREKTSON & SHUMATE,

THE JUAN AND AURORA ACOSTA 200 (TRU)...

NOTICE:

Notice filed; however, does not indicate a copy of petition was served per Pr.C. § 17203(b).

(ww/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

DATE: 03/20/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500110

CASE NAME: LUCIO CORONADO

SEE ALSO 15

HEARING:

Petition for ATTORNEY FEES BY COURT APPOINTED COUNSEL

COUNSEL:

CHERI SIPLE	(CPE)...PRO/PER
LUCIO CORONADO III	(CPE)...FULLERTON LEMANN SCHAEFER & DO
LUCIO CORONADO III	(PET)...FULLERTON LEMANN SCHAEFER & DO
LUCIO CORONADO	(PET)...JAMES B CHURCH

GENERAL INFORMATION:

Continued from 10/31/17. Notice waived.

THIS CASE IS SET FOR HEARING ON Petition for Fees and Compensation by Court-appointed counsel, James B. Church ["Petitioner"].

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

1. Petitioner was appointed on 03/06/15. Petitioner alleges that services have been rendered for which counsel has not been compensated.
2. Attorney requests fees of \$43,113.75. Billed at \$375/hour for 105.9 hours' attorney time and \$75-150/hour for 24.75 hours' paralegal time. Itemized [LF, pgs. 9-18]. JTD.
3. Attorney requests reimbursement of costs advanced of \$24.00. Itemized.
4. Petitioner requests and order authorizing and directing Conservator of the Estate, Lucio Coronado III, to pay for services rendered.
5. Petitioner requests to be relieved as counsel for the conservatee, herein.
6. ~Proposed Order 09/18/17.

RECOMMENDATION:

Court's discretion.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 03/20/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500110

CASE NAME: LUCIO CORONADO

SEE ALSO 14

HEARING:

Accounting Review by ***

COUNSEL:

CHERI SIPLE

(CPE)...PRO/PER

LUCIO CORONADO III

(CPE)...FULLERTON LEMANN SCHAEFER & DO

LUCIO CORONADO III

(PET)...FULLERTON LEMANN SCHAEFER & DO

LUCIO CORONADO

(PET)...JAMES B CHURCH

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review by Conservator of the Person and Estate, Lucio Coronado, III.

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

1. Order Settling First Account entered 09/06/17; second account now due.
2. No accounting or waiver of account. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/20/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600014

CASE NAME: MTR OF GLORIA THORNTON

SEE ALSO 17

HEARING:

Accounting Review by ***

COUNSEL:

DAVID LANDO	(CP)...PRO/PER
DAVID LANDO	(PET)...ROBERTA L. TAYLOR &
GLORIA EVELYN THORNTON	(CEE)...JEANNE E KENNEDY
NATALIE BLICKENSTAFF	(PET)...JENNIFER M DANIEL

GENERAL INFORMATION

Continued from 11/08/17 and 01/24/18 at the request of counsel to file an accounting.

THIS CASE IS SET FOR HEARING ON Accounting Review of Conservator Natalie Blickenstaff

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

1. Natalie Blickenstaff appointed Conservator of the person and estate on 07/07/16 \$100,000 bond, and was also appointed Successor Trustee on same day.
2. **Need** first accounting or waiver for conservatorship estate.

RECOMMENDATION

Inquire status.

(lh/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/20/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600014

CASE NAME: MTR OF GLORIA THORNTON

SEE ALSO 16

HEARING:

Accounting Review by ***

COUNSEL:

DAVID LANDO	(CP)...PRO/PER
DAVID LANDO	(PET)...ROBERTA L. TAYLOR &
GLORIA EVELYN THORNTON	(CEE)...JEANNE E KENNEDY
NATALIE BLICKENSTAFF	(PET)...JENNIFER M DANIEL

GENERAL INFORMATION

Continued from 11/08/17 and 01/24/18 at request of counsel to file an accounting.

THIS CASE IS SET FOR HEARING ON Accounting Review of Successor Trustee,
Natalie Blickenstaff

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

1. Natalie Blickenstaff was appointed Successor Trustee on 07/07/16.
2. **Need** first accounting of trust.

RECOMMENDATION

Inquire status.

(lh/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/20/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600084

CASE NAME: MTR OF SEAN E SITTLER

HEARING:

FIRST Account and Report of SHANNON M DEBENEDICTIS and Petition for allowance of fees filed.

COUNSEL:

SEAN E SITTLER (CEP)...PRO/PER
SHANNON M DEBENEDICTIS (CPE)...HARTNELL LAW GROUP
SHANNON M DEBENEDICTIS (CPE)...PRO/PER

Request for Waiver of Court Fees and Costs filed by SEAN E SITTLER is GRANTED
Fee waiver amount due \$633.00

\$555.00 for temp and general petitions on 04/21/16

\$78.00 for 3 certified copies of the letters on 05/12/16

Request for Waiver of Court Fees and Costs filed by SHANNON M DEBENEDICTIS is GRANTED

Fee waiver amount due 538.00

\$73.00 for 3 certified copies of the letters on 07/14/16

\$465.00 for first account current on 09/19/17

GENERAL INFORMATION:

Continued from **10/24/17** at request of counsel. Mr. Hartnell's Office has been sub'd back in.

Continued from 12/05/17 to amend and file a final account. Conservatee passed away.

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees by Conservator of the Person and Estate by Shannon DeBenedictis ["Petitioner"-sister].

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

1. **Need separate pre and post-death accountings.**
2. Accounting period 07/27/16 to 08/15/17. However, accounting should begin as of day of appointment on 07/12/16. Does Court wish to require amended accounting? JTD.
3. Assets on Hand \$66,384.13 consisting of \$17,884.13 in cash and \$48,500 in personal property.

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.

4. Current bond of \$18,000.
5. Initial and Amended Inventory and Appraisals do not include any bank account(s) as reflected in accounting. Need amended inventory.
6. Petition indicates Conservator is receiving \$2,200 per month for conservatee's care and services. It does not appear this has been authorized by Court. Does court wish to ratify monthly payments and make a formal order authorizing same? JTD.
7. Question whether any receipts were received during the period 07/12/16 to 03/01/17? Need verified supplement.
8. Need Schedule E, Non-Cash Assets on Hand at End of Account period via verified supplement.
9. Need Notice of Hearing with proof of service.
10. Proposed Order 09/19/17 reflects wrong judge and does not include balance and description of the assets on hand, specifically noting the amount of cash included in said balance (Local Rule 20-614c).

RECOMMENDATION:

Need to clear notes then Court's discretion re bond and fees. If approved, set hearing for receipts and final discharge on **03/26/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/20/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700214

CASE NAME: DANIELLE JEAN LENOBLE

SEE ALSO 20, 21

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of SHERYL LENOBLE

COUNSEL:

SHERYL LENOBLE	(PET)...GARY HARRISON
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
DANIELLE JEAN LENOBLE	(CEE)...MITCHELL I ROTH

GENERAL INFORMATION

Continued from **12/18/17** to file required documents.

Continued from 01/30/18. An oral motion to terminate the estate due to lack of assets in the conservatorship is made and granted. All of the assets are in the Special Needs Trust. The court takes jurisdiction over the trust. Order signed. Bond required \$212,300.00

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Sheryl LeNoble, mother, appointed limited conservator of the person and estate on 11/09/17, no bond.
2. **Need** Order Appointing Conservator and Letters of Conservatorship. **Declaration by Attorney Harrison filed 01/19/18 re Order and Letters.**
3. Notification of Conservatee's Rights; Determination of Conservatee's Appropriate Level of Care; Care Plan filed.
4. Final Inventory & Appraisal filed 09/12/17.
5. Proposed Form Order/Letters 01/19/18 & 02/13/18

RECOMMENDATION

Need to clear note 2 then Court's discretion.

(nb)

Future Hearing:

01/17/19 Accounting Review.

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 03/20/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700214

CASE NAME: DANIELLE JEAN LENOBLE

SEE ALSO 19, 21

HEARING:

Hearing Re: Proof of Bond (SNT)

COUNSEL:

SHERYL LENOBLE

(PET)...GARY HARRISON

MITCHELL I ROTH

(PET)...MITCHELL I ROTH

DANIELLE JEAN LENOBLE

(CEE)...MITCHELL I ROTH

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Proof of Bond (SNT)

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

1. Matter set at 01/18/18 hearing, wherein, the Court ordered a bond set in the amount of \$212,300 bond. Need same.

RECOMMENDATION:

Need proof of bond.

(nb)

Future Hearing:

01/17/19 Accounting Review (SNT).

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 03/20/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700214

CASE NAME: DANIELLE JEAN LENOBLE

SEE ALSO 19, 20

HEARING:

Petition for TO TERMINATE CONSERVATORSHIP OF THE ESTATE

COUNSEL:

SHERYL LENOBLE

(PET)...GARY HARRISON

MITCHELL I ROTH

(PET)...MITCHELL I ROTH

DANIELLE JEAN LENOBLE

(CEE)...MITCHELL I ROTH

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Terminate Conservatorship of the Estate, Only [Pr. C. §1861] by Conservator of the Person and Estate, Sheryl J. LeNoble ["Petitioner"].

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

1. Petitioner indicates a conservatorship of the estate is no longer necessary for the conservatee because the Court has approved a SNT and all of the money, approximately \$193,000.00, has been placed in the SNT that was established for the benefit of the Conservatee.
2. Petitioner states that as a result of the transfer of funds into the SNT, there are no longer funds outside the SNT for the Conservator of the Estate to manage and alleges it is in the best interests of the Conservatee to require termination of the conservatorship of the estate because there is no longer any legal reason to incur the expenses associated with maintain a Conservatorship of the Estate.
3. Petitioner requests the conservatorship of the estate be terminated; that petitioner remain conservator of the person, only; that conservator be discharged; and the surety on the bond, to be exonerated.

RECOMMENDATION:

Matter appears moot as an oral motion to terminate the estate due to lack of assets in the conservatorship was made and granted on 01/30/18, as monies are held in the SNT.

(nb)

Future Hearing: 01/17/19 Accounting Review (SNT)

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

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

DATE: 03/20/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700464

CASE NAME: MTR OF CHRISTINE HAMILTON

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CHRISTINE HAMILTON	(CTP)...JENNIFER M DANIEL
JAMES HAMILTON	(CPE)...CHRISTOPHER A POULOS
PAMELA HAMILTON	(CPE)...CHRISTOPHER A POULOS

GENERAL INFORMATION:

Continued from 01/30/18 at request of counsel.

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by parents James and Pamela Hamilton ["Petitioners"].

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. **Need** report of court-appointed counsel, Jennifer Daniel.
3. Medical Capacity Declaration filed.
4. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
5. Petitioner requests to limit civil and legal rights of proposed conservatee to consent or withhold consent to marriage of, or entrance into a registered domestic partnership by limited conservatorship; to exercise limited conservatee's right to control his or her social and sexual contacts and relationships.
6. Petitioners request an order waiving all Probate Investigator's assessments for as long as the requirements of Pr. C. §1851.5 are met. 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.**

7. Court Investigator Report filed.
8. Citation returned served.
9. Inland Regional Center Letter filed.
10. Certificates of Completion re Conservatorship Class filed.
11. ~Proposed Form Order 12/22/17

RECOMMENDATION:

Need to clear note 2. If approved, set hearing for Compliance Review for **10/23/18** 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.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 03/20/18 TIME: 9:30 DEPT: S36P

CASE#: SC SS02145

CASE NAME: MATTER OF ABEL A SANCHEZ

HEARING:

Fourth Account and Report of GEORGIANA D SANCHEZ and Petition
for allowance of fees filed.

COUNSEL:

ABEL A SANCHEZ	(CEP)...MARK J. FLORY
ANNETTE G DEBELLEFEUILLE	(PET)...ANNETTE G DEBELLEFEUILLE
GEORGIANA D SANCHEZ	(CP)...CRAIG M PARKER
GEORGIANA SANCHEZ JENNINGS	(CP)...CRAIG M PARKER
MARK J. ANDREW FLORY	(PET)...MARK J. ANDREW FLORY
RAUL SANCHEZ	(CE)...CRAIG M PARKER
RAUL SANCHEZ	(PET)...ANNETTE G DEBELLEFEUILLE

XREF: SGSS03708 (Ashley N Sanchez)
SCV099443

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Fourth Account Current and Petition for Fees by Conservator or the Estate and SNT Trustee, Raul Sanchez and Conservator of the Person, Georgiana Sanchez Jennings ["Petitioners"].

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

1. Need conformed copy of Order Approving Third Account signed on 03/01/16.
2. Accounting period 10/01/15 to 09/30/17.
3. Assets on Hand \$185,319.65 consisting of \$117,478.59 in cash and remaining in personal property.
4. Petition indicates the current bond of \$191,000 is sufficient. However, the Court increased bond to \$200,000 on 03/01/16. Insufficient. Need bond increase by \$41,000 for a new bond total of \$241,000. JTD.
5. Petitioners waive compensation.
6. Attorney requests fees of \$2,065.00. Billed at \$350/hour for 5.9 hour's attorney time. Itemized [LF, p. 25]. 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.**

7. Property on Hand from third account differs by \$654.00. Does Court wish to deem amount de minimus or require amended schedule(s)? JTD.
8. Disbursements – Schedule C [LF, p. 16] reflects \$360.00 to Lisa D. Contreras for bookkeeping services. JTD.
9. Last CI Report filed 08/15/16.
10. Proposed Order 02/08/18 does not include account period; does not include balance of all assets; and reflects incorrect judge.

RECOMMENDATION:

Need to clear note 1 then Court's discretion. If approved, set next hearing for Accounting Review on **11/26/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 03/20/18 TIME: 9:30 DEPT: S36P

CASE#: SC SS03045

CASE NAME: MTR OF GABRIEL HERNANDEZ

HEARING:

Accounting Review by ***

COUNSEL:

DANNY HERNANDEZ	(CP)...THOMAS W DOMINICK
DANNY HERNANDEZ	(CPE)...THOMAS W DOMINICK
GABRIEL HERNANDEZ	(CEP)...ROBERT S WORLEY
MARIA HERNANDEZ	(CP)...THOMAS W DOMINICK
MARIA HERNANDEZ	(CPE)...THOMAS W DOMINICK

VACATE – Sixth Account filed and set for 04/18/18

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

MISC

DATE: 03/20/18 TIME: 1:30 DEPT: S36P

CASE#: PRO PS1700874

CASE NAME: JOSEPH LUIS NAVARRO

SEE ALSO 26

HEARING:

Court Trial set for PETITION FOR PROBATE of MATTHEW LUIS NAVARRO

COUNSEL:

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

No notes – Court Trial.
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 03/20/18 TIME: 1:30 DEPT: S36P

CASE#: PRO PS1700874

CASE NAME: JOSEPH LUIS NAVARRO

SEE ALSO 25

HEARING:

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

COUNSEL:

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

GENERAL INFORMATION

Continued from **12/04/17**. Marianne and Loreнна Navarro object – to file written objections.

Continued from 01/30/18. Matter is contested; court trial requested.

THIS CASE SET FOR HEARING ON

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

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

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

Petition #1 by Mathew:

1. Petitioner resides in Missouri and requests that bond be determined by the Court. The estate consists of \$80,000.00 in real property. Suggest bond of \$80,000.00.
2. Section 8 of the petition fails to list all persons' relationships to the decedent. Court may wish to clarify on record or in alternative, need verified supplement as to Loreнна and Marianne Navarro.
3. **Need** proof of publication
4. No Form Order Provided.
5. **Objections filed by Loreнна L. Navarro.**
6. **Reply to Objections filed by Matthew Navarro.**

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.

Petition #1 by Lorena:

1. Petitioner requests bond of \$171,000. Appears sufficient. JTD.
2. ~Proposed Form Order/Letters 12/26/17.

RECOMMENDATION for Petition #1 by Mathew

Need to clear note 3 then Court's discretion re note 2 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.

RECOMMENDATION for Petition #2 by Lorena

Court's discretion re bond. If approved, set Accounting/Status Review **06/03/19**. Any account to be filed 30 days in advance of hearing. Note requirements of local rules.

(ww/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 03/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS0801097

CASE NAME: MINERVA DE GUZMAN GESTUVO

HEARING:

THIRD, FINAL Account and Report of MARGARET S. MAR and Petition for allowance of fees filed.

COUNSEL:

FRED D SOLDWEDEL	(TP)...
IKE MIGUEL GESTUVO	(DEXTER ROSARIO
MARGARET S MAR	(PET)...FRED D SOLDWEDEL
MARIA KRISTINA P. GESTUVO	(PET)...CHRISTOPHER A BURY
MINERVA DE GUZMAN GESTUVO	(DEC)...
NORIEL L FLORES	(PET)...NORIEL L FLORES

GENERAL INFORMATION

Continued from 01/03/18. Ms. Nejal present in court to waive her creditor's claim and consents to fees as requested. Mr. Soldwedel gives an oral report regarding extraordinary fees. The Court requests verified supplement justifying extraordinary fee requests.

THIS CASE IS SET FOR HEARING ON Third Account Current and Report of Margaret Mar, Administrator.

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

1. Accounting period 01/07/15 to 08/17/17
2. Assets on hand **\$70,970.06, cash**
3. Current bond of \$92,400
4. Petitioner Margaret Mar requests **\$9,019.71** for statutory compensation. Calculated.
5. Petitioner Margaret Mar requests **\$9,019.71** for statutory attorney compensation, and proposes \$3,000 be paid to Noriel L. Flores (former attorney for former administrator Maria Gestuvo), and remaining \$6,019.71 to be paid to attorney Fred D. Soldwedel (attorney for administrator Margaret Mar). **Question if requested fees are by agreement? Need verified supplement.**

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.

6. Margaret Mar, petitioner/administrator, requests extraordinary fees totaling **\$8,000** for sale of real property and settlement of tax debts.
 - a. The court will generally not consider awarding extra-ordinary fees until the executor and/or counsel establish that all ordinary fees have been actually been earned. (In re Walker Estate (1963) 221 Cal App. 2d 792). **Need verified supplement in support of extraordinary fees per CRC 7.751(b), 7.702.**
7. Attorney Fred D. Soldwedel seeks extraordinary fees totaling **\$44,930**. On 04/20/09, Corazon S. Nejal, purchaser of real property, paid Fred Soldwedel a retained fee of \$25,000 as a retainer for removing prior administrator Maria Gestuvo. Attorney Soldwedel assisted petitioner Margaret Mar from becoming personally liable for decedent's tax debts; prepared tax returns for 2001 to 2006, and assisted petitioner in paying resulting assessments. He prepared a Request for Discharge from Personal Liability with the Internal Revenue Service. He assisted petitioner in competitively selling decedent's one-half interest in real property, and prepared a creditor's claim for Corazon Nejal.
 - a. The court will generally not consider awarding extra-ordinary fees until the executor and/or counsel establish that all ordinary fees have been actually been earned. (In re Walker Estate (1963) 221 Cal App. 2d 792). **Need verified supplement in support of extraordinary fees per CRC 7.751(b), 7.702.**
8. Petitioner Margaret Mar requests reimbursement to Corazon S. Nejal for a total of **\$40,271.23** consisting of a creditor's claim of \$19,479.16 and \$20,792.07 for decedent's owing mortgage payments which were paid to prevent foreclosure.
 - a. Need verified supplement with proof of payments. **Waived on 01/03/18.**
9. There do not appear to be enough assets on hand to pay requests for extraordinary fees and reimbursement to Corazon Nejal. **Question how administrator and attorney Soldwedel intend to collect payment? Need verified supplement.**
10. Requests for extraordinary fees are not included in prayer.
11. No proposed Order submitted.

RECOMMENDATION:

Need to clear notes 5-7 & 9. If approved, Court to set hearing re receipts/final discharge for **03/27/19**.

(lh/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500757

CASE NAME: ROBERT CHARLES LAMAR

HEARING:

Accounting Review by ***

COUNSEL:

MARJORIE LAMAR (PET)... SCOTT S STREED
ROBERT CHARLES LAMAR (DEC)...

GENERAL INFORMATION

Continued from **11/30/16** and **03/29/17**. Waiting for Inventory and Appraisal to come back from referee.

Continued from **06/07/17, 09/20/17, 11/29/17 and 01/03/18 at request of Counsel.**

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters Testamentary issued to Marjorie Lamar, daughter, on 12/09/15; full authority \$95,000 bond.
2. Final Inventory and Appraisal filed 11/27/17.
3. **Need** accounting or status report.

RECOMMENDATION

Need to clear note 3. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. § 11050 et seq. *Clerk may notice bond company*

(lc/ww/lc/lh/nb)

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

DATE: 03/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500787

CASE NAME: MTR OF PAUL R HANLEY(MASTERFILE)

HEARING:

Final report on waiver of Account and Report of ALEXANDRIA
TOPPING and Petition for allowance of fees filed.

COUNSEL:

ALEXANDRIA TOPPING	(OBJ)...PECCORINI & PECCORINI
ALEXANDRIA TOPPING	(PET)...PECCORINI & PECCORINI
PAUL R HANLEY	(DEC)...
TRACY LYN COX	(PET)...JANIS B MARTINDALE
TYLER TOPPING	(PECCORINI & PECCORINI

X-REF: PRFOPS 1501103

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by Co-Administrators, Alexandria Topping and Tracy L. Cox ["Petitioners"].

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

1. Petition alleges all heirs waive accounting. Need same.
2. Accounting period 05/03/15 to 11/11/17.
3. Need balance and description of the assets on hand, specifically noting the amount of cash included in said balance per Local Rule 20-614.
4. Petitioners waive statutory compensation.
5. Attorney Martindale and Attorney Peccorini request one-half statutory fees of \$10,004.06 or \$5,002.03 each. Calculated.
6. Attorney Martindale requests reimbursement of costs advanced of \$1,057.50. Generally described.
7. Attorney Peccorini requests reimbursement of costs advanced of \$156.00. Generally described.
8. Mark Hanley (brother) requests reimbursement of costs advanced of \$14,464.95. Generally described.
9. Tracy requests reimbursement of costs advanced of \$4,286.53. Generally described.

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.

10. Alexandria requests reimbursement of costs advanced of \$1,629.93. Generally described.
11. Petition indicates that in or about November 2017, heirs agreed to a Transfer and Distribution Agreement under which Alexandria and Tyler would acquire the House from the estate and an offsetting cash distribution of \$50,000 would be made to Tracy. It was agreed, without prior court authorization, that such acquisition and offsetting cash distribution would be made prior to hearing of this Petition to limit the estate's liability as owner of the House. Does Court wish to ratify subject Agreement? JTD.
12. Petition indicates all cash of the estate, in the Estate account, is not interest bearing. Need further clarification via verified supplement.
13. Petitioner requests authority to withhold \$1,000 as a reserve for closing costs. JTD.
14. No proposed order. Submit Order after Hearing.

RECOMMENDATION

Need to clear notes 1, 3 & 12 then Court's discretion re: notes 11 & 13. If approved, set next hearing for receipts and final discharge for **03/26/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500880

CASE NAME: Carol A. Ayres

HEARING:

Accounting Review by ***

COUNSEL:

CAROL A. AYRES	(DEC)...
AUDESİ AYRES	(PET)...LAW OFFICE O F DAVID E WE ISS
LAWRENCE	(TP)...

GENERAL INFORMATION

Continued from 11/29/17. No appearances. Court refers matter to Public Administrator for possible appointment as Successor Administrator. The Court orders Audesi Ayres to be present at next hearing to address the issue of why she should not be removed as administrator and the issue of missing real property. Notice by Judicial Assistant.

Continued from 01/30/18. The Public Administrator represents the escrow closing statement on the property has been received. The Public Administrator intends to seek a surcharge of \$10,000.00 plus attorney fees. The Court hereby suspends the powers of the administrator, Audesi Ayres and appoints the Public Administrator as Special Administrator in the interim. Bond company to be present at hearing.

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 Audesi Ayres, sister, on 11/03/15; full authority, \$250,000 bond.
2. On 05/17/17, Court denied Petition to Terminate Further Proceedings and ordered accounting to be filed by 07/31/17.
3. Need accounting or status report.
4. ~Proposed Form Order/Letters 02/08/18.

RECOMMENDATION

Inquire status of accounting or status report.

(ww/lh/nb)

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

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

DATE: 03/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500937

CASE NAME: SANTOS TORRES MARTINEZ

HEARING:

Hearing Re: RPT SALE & PTN FOR ORDER CONFIRMING SALE

COUNSEL:

CATHERINE MARTINEZ RISTER'STRA (PET)...PRO/PER
INES MINERBA AVILA (PET)...PRO/PER
SANTOS TORRES MARTINEZ (DEC)...

GENERAL INFORMATION:

Petitioners, Ines Minerba Avila and Faustino Mondrago, represent purchasers MJGF Avila, LLC as co-trustees of Alvarado F& G Trust, and manager.

Continued from 12/28/17. Petition denied. The Court refers matter to the Public Administrator to investigate and report on special administration and whether a probate needs to be opened.

Address	3412 Cajon Blvd, San Bernardino 92407, APN: 0267-241-10-0-000
Appraised value	\$80,000.
Reappraisal	\$210,000
Sale Price	\$49,238.33, which appears insufficient. Need 90% of appraised value per §10309(a)(3).
Deposit	\$21,238.33
First overbid	\$84,500
Commission	Sale without broker.
Bond	Incomplete.
Reason for sale	Taxes

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.**

Exposure to market **None. Supp 12/19/17, it is unknown what actions Catherine Martinez Rister'stra took to expose property to market. Petitioners Avila and Mondrago were only involved in redeeming property from a Tax Lien Sale by paying delinquent property taxes prior to auction.**

Notice **Need to file original Proof of Publication notice per Pr. C. §10300 Supp. 12/19/17 alleges publication was responsibility of the petitioner for probate, Catherine Martinez Rister'stra. Publication was never made. Petition for probate was dismissed without prejudice on 10/25/17 for failure to clear probate notes.**

~Proposed form order: 11/16/17

(lc/nb)

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

DATE: 03/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500953

CASE NAME: ROBERT T CHAMP JR

HEARING:

First & Final Account and Report of ROBERT T CHAMP III and
Petition for allowance of fees filed.

COUNSEL:

BRADEN WILLIAM JOHNSON	(MIN)...
JORDYN LEE CHAMP	(MIN)...
KAYLEE ANN CHAMP	(MIN)...
ROBERT T CHAMP III	(PET)...J. BENJAMIN SELTERS III
ROBERT T CHAMP JR	(TRU)...

XREF: PROPS1501163 (Robert T Champ, Jr)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account; Surcharge of Beneficiary; and Petition for Fees by Successor Trustee, Robert T. Champ III ["Petitioner"-son]. Pr. C. §17200 (b).

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

1. Accounting period 07/28/15 to 09/15/17.
2. Assets on Hand \$728,461.36 consisting of \$557,126.43 in cash and remaining in real and personal property.
3. Petitioner requests compensation of \$1,302.00. Billed at \$35/hour for 37.2 hours' time. Itemized [LF, p. 80-82]. JTD.
4. Attorney requests fees of \$12,062.50. Billed at \$250/hour for 48.25 hours' attorney time. Itemized [LF, pgs. 83-86]. JTD.
5. Attorney Selters requests reimbursement of costs advanced of \$2,005.08. Itemized.
6. Starting Assets – Schedule A [LF, p.15] does not include Chase Checking Acct. XXX3798. Need further clarification via verified supplement.
7. Question if Chase Bank Acct. # XXX8960 has been determined to be a trust asset? Need verified supplement.
8. Need copy of bank statement to support closing balance.

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

9. Need vehicle license number(s) and description.
10. Need findings re: sole and separate property.
11. Need findings re: known creditors.
12. Need findings re: all taxes have been paid, or reserve made for taxes.
13. Need address of beneficiary receiving real property.
14. Need statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary per Pr. C. § 1064 (a)(4). Need verified supplement.
15. Need verified supplement indicating if cash has been invested and maintained in an interest bearing account per Pr.C.§ 1064(a)(5).
16. Need statement regarding notice to Director of Health Care Services or notice per Pr. C. § 9202(a).
17. Need statement regarding notice to California Victim and Compensation and Government Claims Board or notice per Pr. C. § 9202(b).
18. Need statement regarding notice to Franchise Tax Board or notice per Pr. C. § 9202(c)(1).
19. Petitioner alleges without better evidence of possible other assets, Trustee felt that collection efforts should not be pursued.
20. Petitioner alleges the responsibility for any fines for code violations should rest with Todd Champ because it is trustee's position that all the cleanup, delay and junk on the real property was caused or substantially worsened by Todd Champ.
21. Petitioner requests the distribution proposed in Order entered 06/09/16, Attachment E [LF, pgs. 65-74] be approved. JTD.
22. Petitioner reserves the right to assert a more involved position in response to challenges.
23. Petitioner requests the Court appoint Brenda Johnson as Trustee in this trust under the terms therein for the two trust shares of her children, Jordyn Champ and Braden Johnson, subject to her consent and bond if ordered by this court, or as their GAL, as petitioner does not consent to be trustee for his sister's children,. JTD.
24. Petitioner requests authority to withhold the sum of \$15,000 as a reserve. JTD.
25. Proposed Order 12/13/17 is not complete in itself without reference to the petition which it is based. Local Rule 20-614.

RECOMMENDATION:

Need to clear notes 6-18 then Court's discretion. If approved, set next hearing for receipts and final discharge for **03/26/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600739

CASE NAME: MTR OF GALILEE L GLANVILLE

HEARING:

FINAL Account and Report of CONSTANCE L KNOX and Petition for allowance of fees filed.

COUNSEL:

CONSTANCE L KNOX (PET)...PRO/PER
GALILEE L GLANVILLE (DEC)...

GENERAL INFORMATION

Continued from 01/03/18 on Court's motion. Petitioner to file a verified supplement bringing all issues filed with the court together. Petitioner is urged to speak with counsel.

THIS CASE IS SET FOR HEARING ON **AMENDED [02/26/18]** Petition for Final Distribution upon **Waiver of Account** and for Fees by Constance L Knox.

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

- 1. All beneficiaries waive accounting.**
2. Petitioner waives compensation.
3. Petitioner does not request reimbursements for costs.
4. **Need** statement regarding notice to Franchise Tax Board or notice per Pr. C. § 9202(c)(1).
5. **Petitioner mistakenly took the following actions without prior court approval;**
 - a. **Petitioner and other beneficiaries assigned their interest in the real property to sibling Gregory Glanville to allow him to secure a new mortgage in his name to pay-off the existing reverse mortgage directly. Petitioner alleges she was unaware she did not have authority for the pay-off and sale of the home to one of the beneficiaries.**
 - b. **Petitioner in error released the vehicle, through DMV title release, to Gregory Glanville so he could pay for insurance on the vehicle. Petitioner alleges she did not have authority to release the asset and transfer the vehicle to Gregory.**

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.

c. **Petitioner distributed the 60 shares of Disney stock evenly, amongst the 5 beneficiaries. Petitioner alleges she was unaware she did not have authority to make such transfer.**

There does not appear to be harm to creditors or estate. JTD.

6. **Petitioner requests ratification for prior actions taken by Petitioner, to include having the Champion Reverse Mortgage paid off and title transferred to Gregory J. Glanville; transfer of vehicle to Gregory J. Glanville; and transfer of 12 shares to each of the 5 beneficiaries.**
7. Petitioner has already distributed remaining assets to heirs without prior Court authority. Receipts filed.
8. **Need Notice of Hearing with proof of service as to amended account.**
9. No proposed order submitted. Submit Order after Hearing.

RECOMMENDATION

Need to clear notes 4 & 8 then Court's discretion. If approved, set next hearing for final discharge for 03/25/19.

(lh/cs/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 03/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600739

CASE NAME: MTR OF GALILEE L GLANVILLE

SEE ALSO 7

HEARING:

Petitioner for final distribution and etc Account and Report of
CONSTANCE L KNOX and Petition for allowance of fees filed.

COUNSEL:

CONSTANCE KNOX (PET)...PRO/PER
GALILEE L GLANVILLE (DEC)...

VACATE – duplicate setting

(nb)

Superior Court of Calif, County of San Bernardino

Page: 7B

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

DATE: 03/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700419

CASE NAME: MTR OF MERLIN POLK

HEARING:

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

COUNSEL:

LOIS MEEK	(PET)...USHER LAW GROUP, PC
MERLIN POLK	(DEC)...
ROBERT POLK	(OBJ)...HEDTKE LAW GROUP
ROBERT POLK	(PET)...HEDTKE LAW GROUP

Address: 947 Spruce St., San Bernardino, CA 92410

Appraised Value: \$200,000

Sale price: **\$158,000. However, sale must be 90% (\$180,000) of appraised value per Pr. C. § 10309(3).**

First overbid: \$166,400

Deposit: **\$10,000. Insufficient. Deposit must be 10% of the purchase prices unless the sale is VA or FHA financed.**

Commission: 5% = \$7,900

Additional bond: Currently at \$20,000. Proceeds to be deposited in a blocked account at City National Bank in Los Angeles.

Reason for Sale: Necessary to pay debts and expenses of administration.

Exposure to Market: Listed on MLS and syndicated through real estate portals.

Notice: **Notice does not include real estate broker. Need proper service.**

(nb)

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.**

Future Hearing:

04/05/18 Hearing re: Petition for letters of admin. w/full etc.

04/05/18 Petition for letters of administration etc.

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

Superior Court of Calif, County of San Bernardino

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

DATE: 03/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700889

CASE NAME: THE BROWN FAMILY TRUST

HEARING:

Petition for TERMINATION OF TRUST PROBATE CODE 17200(b)(13)

COUNSEL:

LAUREL MCLINDEN (PET)...JOHN G WURM
THE BROWN FAMILY TRUST (TRU)...

Currently under review by Legal Research

(LR)

Notice given; however, Trust's Certification indicates original and all copies of trust have been lost or destroyed.

(lh/cs/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 03/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700927

CASE NAME: MTR OF JASMATEE SATRAHAN

HEARING:

Accounting Review by ***

COUNSEL:

HARRY NARINE

(PET)...ACCESS LAWYERS GROUP

JASMATEE SATRAHAN

(DEC)...

VACATED– accounting review should be in 2019.

(nb)

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

DATE: 03/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701159

CASE NAME: RAYMOND JERRY MICHAEL

HEARING:

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

COUNSEL:

RAYMOND JERRY MICHAEL (DEC)...
ROBERT A WHEET (PET)...PRO/PER

XREF: PROPS1600825 (Raymond Jerry Michael)

GENERAL INFORMATION

Continued from 12/28/17. Public Administrator's Office is involved and requests case be set on a PA calendar.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Robert Wheet, cohabitant.

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

1. Petitioner states all heirs waive bond. However, no bond waiver by nephew who appears to be sole heir; **need** waiver. Estate consists of \$250,000 in real property. Court for good cause could require bond per Pr.C. § 8481(b).
2. **Need** Notice to Petition to Administer Estate and proof of service to nephew Robert Char.
3. **Need** proof of publication.
4. Letter attached to petition regarding petitioner as decedent's companion; however, there is nothing indicating there is a will and/or assignment of interest.
5. Nephew Robert Char [allegedly incarcerated] and Public Administrator have higher priority; however, no objections filed at time of review.
6. ~Proposed Form Order: 11/16/17.

RECOMMENDATION

Need to clear notes 1-3. If approved, set Accounting/Status Review for **05/28/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/nb)

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

Superior Court of Calif, County of San Bernardino

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

DATE: 03/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701177

CASE NAME: MARIA FELIX PERRONE

HEARING:

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

COUNSEL:

GLORIA VALDIVIA (PET)...MARIVEL M ZIALCITA
MARIA FELIX PERRONE (DEC)...

GENERAL INFORMATION:

Continued from 01/02/18 on courts motion. Proof of publication filed 12/29/17 is unsigned. Matter continued for signed proof of publication.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by daughter, Gloria Valdivia ["Petitioner"].

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

1. Petitioner requests bond be set in the amount of \$320,000. Appears sufficient. JTD.
2. ~Proposed Form Order/Letters 11/22/17.

RECOMMENDATION:

RFA, \$320,000 bond. If approved, set future hearing for Accounting/Status Review on **03/05/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701267

CASE NAME: WARREN ROSCELL STOCKTON

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL IAEA

COUNSEL:

MARIA CELIA STOCKTON	(PET)...ILIANA MADRIGAL
SALEA NELSON	(OBJ)...
WARREN ROSCELL STOCKTON	(DEC)...

GENERAL INFORMATION:

Continued from 01/30/18. Counsel represents this petition is seeking limited authority not full authority. The Court informs Salea Nelson a proof of service of the objections need to be submitted to the Clerk's Office. Referred Court refers this matter to the Public Administrator.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with LIMITED authority under IAEA spouse, Maria Celia Stockton ["Petitioner"].

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

1. Petitioner requests bond of \$20,000 as petitioner is requesting limited authority. Estimated estate valued at \$315,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). JTD.
2. Need Duties and Liabilities of Personal Representative form.
3. **Objections filed 01/22/18 by daughter of decedent, Salea Nelson.**
4. ~Proposed Form Order 12/18/17.

RECOMMENDATION: Matter is contested.

Need to clear note 2 then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **05/28/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(nb)

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

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

DATE: 03/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701277

CASE NAME: MTR OF ERIC JONES

HEARING:

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

COUNSEL:

CASEY GORDON JONES (PET)...PRO/PER
ERIC JONES (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by son, Casey Gordon Jones ["Petitioner"].

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

1. Section 2c re: bond is incomplete. Estimated estate valued at \$143,000. Petitioner is an out-of-state resident. Suggest bond of \$143,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). JTD.
2. Section 3h(3) or (4) re: residency is incomplete. Need verified supplement.
3. Section 4 indicates Decedent's will does not preclude administration of this estate under IAEA. However, caption and section 3f(1) indicate Decedent died intestate.
4. Section 9 re: number of pages attached is blank. However, there are no attachments.
5. Need proof of publication.
6. Need Notice of Petition to Administer Estate with proof of service.
7. No proposed order/letters. Submit after hearing.

RECOMMENDATION:

Need to clear notes, \$143,000 bond If approved, set future hearing for Accounting/Status Review on **05/28/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800097

CASE NAME: JAMES WALTER BLACKBURN

HEARING:

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

COUNSEL:

JAMES WALTER BLACKBURN (DEC)...
LINDA TOMKO (PET)...JOHN F WEBER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by named co-executor, Linda Tomko ["Petitioner"].

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

1. Declination by named co-executor, Michael Anderson, affixed to petition [LF, p. 13]
2. Will waives bond. Estimated estate valued at \$302,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). JTD.
3. Will includes hand-written interlineation initialed but not dated by Decedent. Does Court wish to require points and authority concerning the validity of the interlineation and its effect as a valid amendment? JTD.
4. Section 8 to petition does not include ages for Megan Branson or William Kratzer. Need verified supplement.
5. Question whether Charlene Branson named in will is the same as Charlene Dyer? Need verified supplement.
6. There appears to be at least one minor beneficiary. Does Court wish to appoint GAL or Guardian of the Estate? JTD.
7. Need proof of publication.
8. Notice filed on 02/14/18 does not include step-grandson, William Kratzer or friend, George Salerno. Need proper service.
9. ~Proposed Form Order/Letters 01/31/18.

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.**

RECOMMENDATION:

Need to clear notes then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **05/28/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **TRUSTS AND MOTIONS**

DATE: 03/20/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700837

CASE NAME: ROBERT DETAR AND JEAN DETAR TRUST

HEARING:

Petition for TO MODIFY TRUST

COUNSEL:

ROBERT DETAR

(PET)...AARON CHARLES GREGG

ROBERT DETAR AND JEAN DETAR TR

(TRU)...PRO/PER

Currently under review by Legal Research.

(LR)

Notice given.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **CONSERVATORSHIP**

DATE: 03/20/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700318

CASE NAME: KATYA IXCEL VALLEJO

HEARING:

Petition for Appointment of Conservator

COUNSEL:

KATYA IXCEL VALLEJO (CTP)...SANDY L. TURNER
ROSA M VALLEJO (PET)...PRO/PER

GENERAL INFORMATION

Continued from **10/10/17** at request of petitioner to clear notes and appoint counsel. Attorney Sandy L. Turner appointed.

Continued from 01/02/18 at request of petitioner. The Court appoints Mitchell Roth as guardian ad litem to determine whether a medical malpractice lawsuit should be filed.

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

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

1. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract.
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks medical powers. Capacity Declaration filed.
4. Proposed conservatee is developmentally disabled. Report by appointed counsel, Sandy L. Turner, filed.
5. Proposed conservatee is developmentally disabled. IRC report filed
6. **Need** report by GAL, Mitchell Roth.
7. **Need** return of citation.
8. Notice filed 01/03/18 does not specify the type of hearing and is incomplete. **Need** notice of hearing and proof of service, including 30 days' notice to Inland Regional Center.
9. Court Investigator report filed.
10. Certificate of Completion of the Conservatorship Training Class filed.

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.**

11. ~Proposed Form Order: 08/24/17

RECOMMENDATION

Need to clear notes 6-8. If approved, set hearing for Compliance Review for **10/23/18** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 03/20/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700378

CASE NAME: MATILDE ALVARADO

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MARIA ALVARADO (PET)...PRO/PER

MATILDE ALVARADO (CEE)...MARK J. FLORY

GENERAL INFORMATION:

Continued from 01/02/18. Counsel's report filed in the courtroom. Counsel to assist petitioner in providing a capacity declaration and checking into IRC services. Petitioner to take conservatorship class. The Court recommends the on-line Spanish speaking class.

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by mother Maria Alvarado [Petitioner].

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. **Report by court-appointed counsel, Mark Flory, filed.**
3. Need Medical Capacity Declaration.
4. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
5. Proposed limited conservatee's civil and legal rights are not to be limited without a court order.
6. Citation returned SERVED.
7. Court Investigator Report filed.
8. Need Inland Regional Center Report.

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

9. **Certificate of Completion re Conservatorship Class filed.**
10. Notice filed on 11/28/17 does not include IRC. Need proper service.
11. ~Proposed Form Order/Letters 10/17/17.

RECOMMENDATION:

Need to clear notes 3, 8 & 10. If approved, set hearing for Compliance Review for **10/23/18** 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.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 03/20/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800029

CASE NAME: DAYANIRA LANAY HILL

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CARLEAN HOLLOWAY (PET)...PRO/PER

DAYANIRA LANAY HILL (CEE)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by mother, Carlean Holloway ["Petitioner"].

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. **Need** appointment of counsel and report by same.
3. **Need** Medical Capacity Declaration.
4. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
5. Proposed limited conservatee's civil and legal rights are not to be limited without a court order.
6. Citation returned SERVED.
7. Court Investigator Report filed
8. **Need** Inland Regional Center Report.
9. **Need** Certificate of Completion re Conservatorship Class.
10. ~Proposed Form Order/Letters 02/13/18.

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.**

RECOMMENDATION:

Court to appoint counsel then need to clear notes. If approved, set hearing for Compliance Review for **10/23/18** 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.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/20/18 TIME: 9:30 DEPT: S37P

CASE#: RC RS00049

CASE NAME: IN THE MTTR OF THELMA RAE SCHONEVELD

HEARING:

Hearing Re: COURT INVESTIGATOR REPORT FILED 1/19/18

COUNSEL:

HENRIETTA SCHONEVELD	(PET)...ALAN D PAUW
JOHN SCHONEVELD	(PET)...ALAN D PAUW
LORETTA SCHEENSTRA	(SC)...ALAN D. PAUW, INC
THELMA RAE SCHONEVELD	(PCE)...MATTHEW E SHEASBY

GENERAL INFORMATION:

Thelma Schoneveld (sister) appointed Successor Conservator of the Person and Estate on 09/29/00. Waiver of Account [Pr. C. §2628 approved on 10/05/05 for period 07/18/03 to 08/05/05].

THIS CASE IS SET FOR HEARING ON Court Investigator Report filed 01/19/18.

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

1. Attorney Matthew E. Sheasby appointed. Counsel to report to court status of the conservatorship estate. Need same.
2. Court Investigator reports there has been no accounting or waiver since 2005 when court failed to set future accounting/waiver date. It appears only income is SSI although there may have been an inheritance and there may be ownership of a burial plot.
3. Court and Counsel to address Court Investigator's comments/assessment regarding voting rights.
4. Notice given by Judicial Assistant.

RECOMMENDATION:

Need to clear note 1. If approved, set next hearing on 60 days for Accounting Review. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.
(nb)

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

DATE: 03/20/18 TIME: 9:30 DEPT: S37P

CASE#: SC SS00280

CASE NAME: IN THE MATTER OF JOSEPH WARREN HOLT

HEARING:

Petition for Court-appointed attorney fees

COUNSEL:

JOSEPH HOLT	(CEP)...SHERRI L KASTILAHN
JOSEPH WARREN HOLT	(CEP)...SHERRI L KASTILAHN
MARIA K HOFFMAN	(CPE)...M DANIEL SAYLOR
SHERRI L. KASTILAHN	(PET)...SHERRI L KASTILAHN
VERONICA LANUZA	(CP)...M DANIEL SAYLOR
VERONICA LANUZA	(SC)...PRO/PER

GENERAL INFORMATION:

Continued from 01/02/18. No appearances. The Court notes matter has been transferred to Los Angeles County and questions whether this petition should be heard in Los Angeles County. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Petition for fees and compensation by Court-Appointed Counsel, Sherri Kastlahn ["Petitioner].

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

1. Petitioner was appointed on 07/28/04. Petitioner alleges that services have been rendered for which counsel has not been compensated.
2. Attorney requests fees of \$4,330.00. Billed at the reduced fee of \$300/hour for 14.50 hours' attorney time. Itemized [LF, pgs. 4-5].
 - a. Does not comply with Local Rule 20-1402(b) as fee request exceeds two years. JTD.
3. Petitioner requests an order directing Conservator of the Estate to pay requested sum for services rendered.
4. ~Proposed Order 11/28/17.

RECOMMENDATION:

Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/20/18 TIME: 9:30 DEPT: S37P

CASE#: SC SS02049

CASE NAME: MATTER OF LAWRENCE SQUILLACOTE

HEARING:

First and final Account and Report of LAWRENCE DEAN II and
Petition for allowance of fees filed.

COUNSEL:

LAWRENCE A DEAN II	(CPE)...PRO/PER
LAWRENCE SQUILLACOTE	(CEP). ANNETTE G DE BELLEFEUILLE.
LINDA SQUILLACOTE	(PET)...
MELODIE Z SCOTT	(TP)...PRO/PER
RAYMOND SQUILLACOTE	(CP)...CHRISTOPHER A POULOS
THERESE SQUILLACOTE	(CP)...CHRISTOPHER A POULOS

Request for Waiver of Court Fees and Costs filed by LAWRENCE SQUILLACOTE is GRANTED

Fee waiver amount due \$530.00
\$230.00 for accounting on 11/18/17
\$300.00 for ex-parte pet and 5 orders on 02/05/18

Fee waiver amount due for CI \$2,500.00
\$350.00 for order on 11/15/05
\$350.00 for order on 09/24/08
\$450.00 for order on 10/26/09
\$450.00 for order on 01/20/11
\$450.00 for order on 11/13/13
\$450.00 for order on 10/06/15.

GENERAL INFORMATION:

Conservatee passed away on 04/17/17.

THIS CASE IS SET FOR HEARING ON First and Final Account of Conservator of the
Person and Estate, Lawrence A. Dean II, and Petition for Fees.

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

- 1 Need final Inventory & Appraisal with supporting statement per Pr.C.§2610.
- 2 Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
- 3 Accounting period 01/01/12 to 06/30/17 (5.5 years). **However, appointment was made at Court Trial on 10/16/02, no bond. Need amended account**

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.

- beginning 10/16/02 to include separate pre and post-death account periods.**
- 4 **Ex Parte Petitions to Dispense with Account and Proposed Orders for periods 11/21/02 to 11/20/11 received and forwarded for processing.**
- 5 Assets on Hand \$0.00
- 6 No bond.
- 7 Petitioner requests compensation of \$5,057.45 and ratification of \$500 paid in 2012. Billed at \$65-\$105/hour for services rendered. Itemized [LF, pgs. 25-31]. JTD.
- a. Question how petitioner proposes to be paid as there are no assets? Court to inquire.
- 8 Petitioner does not request reimbursements.
- 9 Petitioner has not used mandatory Summary of Account (GC-400/405). Court may wish to direct petitioner to use mandatory form(s) on future accountings.
- 10 Need residential facility statements and/or written verification of rent per Pr.C. §2620(c)(5).
- 11 During the accounting period, petitioner paid Christina Erickson for case management fees of \$112.50. Need verified declaration for acknowledgment of receipt of fees per Local Rule 20-1406(c).
- 12 Need closing bank statement ending 06/30/17.
- 13 Petitioner alleges notice to court-appointed counsel, Annette deBellefeuille, should be waived. JTD.
- 14 Petitioner requests termination of the Conservatorship as Conservatee is now deceased. Deny.
- 15 Need Notice of Hearing with proof of service.
- 16 No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need amended account to be set on first check calendar no sooner than **05/29/18**. If approved, set next hearing for receipts and final discharge on **01/18/19**. **Court to inquire re SNT accounting, for SNT established on 10/18/05, and set an Accounting Review for same.**

(nb)