



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 03/27/18

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.

nb0312/0322

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: 03/27/18 TIME: 8:30 DEPT: S35P

CASE#: PRO DS1000533

CASE NAME: JOHN C. SIEBERT

SEE ALSO 2

HEARING:

Hearing Re: OSC RE SURCHARGE ON ARTHUR BOLTON OF \$1,500.00

COUNSEL:

ARTHUR R. BOLTON (PET)...PAUL S. MARCHAND

JOHN C. SIEBERT (DEC)...

GENERAL INFORMATION:

Matter set at **08/25/15** hearing due to non-appearance and failure to prepare report as previously ordered, by Attorney Paul Marchand. Notice given by Judicial Assistant.

Continued from **10/13/15**. Court orders clerks' office to send counsel notice at the Cathedral City address. Court orders counsel to be present.

Continued from **12/15/15**. Attorney Paul Marchand has failed to appear and failed to file accounting as ordered. Citation issued as to: Paul Marchand.

Continued from **03/15/16 and 06/07/16**. Citation issued to: Paul Marchand who is cited and required to appear on 09/13/16.

Continued from 09/13/16. Court orders that the powers of Arthur Bolton are suspended until further order of the court. Court appoints the public administrator as special administrator. Public Administrator to prepare order/letters of special administrator. Citation issued to: Arthur Bolton.

Continued from 11/22/16. Court takes OSC re Sanctions/Contempt off calendar and reinstates powers of administration of Arthur R. Bolton and discharges the Public Administrator as Special Administrator. Court relieves Public Administrator. Counsel to prepare status/accounting by 02/21/17. If no report is filed, appearance is required.

Continued from 03/21/17 and 05/16/17 at request of Counsel. Substitution of attorney will be filed as new counsel will be substituting into the case. Notice to be given by Attorney Paul S. Marchand.

Continued from 07/18/17 due to non-appearances. Court sets OSC re Sanctions of \$500 as to Attorney Marchand and Administrator for failure to appear or file accounting. Notice by Judicial Assistant.

Continued from 01/16/18. Counsel notes that his client has informed him

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.

That he wants to have new counsel: Fera Mostow. Substitution of Attorney or motion to withdraw to be filed by 4pm February 27, 2018. Court orders Arthur R Bolton to be personally present in court on march 27, 2018 at 8:30am for the OSC re surcharge on administrator- if not court will impose on Arthur Bolton a surcharge in amount of \$1,500.00. Notice to be given by Paul S Marchand to Arthur Bolton. Nothing new filed.

THIS CASE IS SET FOR HEARING ON **OSC re Sanctions and Surcharge** for FTA/Failure to File Report on Accounting/Status Review

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

1. Letters issued **6/6/11**, full IAEA, no bond.
2. Need inventory & appraisal with supporting financial statements per Local Rule 20-908.
3. Accounting or status report now due. Need same.

RECOMMENDATION:

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

(kra/vet/cbr//vet/cbr/vet/tax/cbr/nb/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: 03/27/18 TIME: 8:30 DEPT: S35P

CASE#: PRO DS1000533

CASE NAME: JOHN C. SIEBERT

SEE ALSO 1

HEARING:

Accounting Review by ***

COUNSEL:

ARTHUR R. BOLTON

(PET)...PAUL S. MARCHAND

JOHN C. SIEBERT

(DEC)...

See matter #1.

(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: 03/27/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1301068

CASE NAME: The Robert Bruce Cumming & Lois Wielen Cumming tru
SEE ALSO 17

HEARING:
Hearing Re: RCPT OF REMITTITUR

COUNSEL:

JANET ANNE CUMMING	(PET)...EDWARD B FISCHER &
NATALIE BLICKENSTAFF	(PET)...JENNIFER M DANIEL
NATALIE BLICKENSTAFF	(SC)...JENNIFER M DANIEL
ROBERT BRUCE CUMMING & LOIS WI	(TRU)...
STEVEN ROBERTSON CUMMING	(APP)...PRO/PER
STEVEN ROBERTSON CUMMING	(RES)...PRO/PER
US SPECIALTY INSURANCE COMPANY	(PRO/PER
WILLIAM HENRY CUMMING	(PET)...EDWARD B FISCHER &

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

GENERAL INFORMATION

Continued from 01/17/18. Court orders Steven Cumming to mail a copy of anything he has filed with the court January 2, 2018 and thereafter to Jennifer Daniel by 4pm January 22, 2018; additionally, court orders Steven Cumming to file proof of service by 4pm January 22, 2018 which reflects a copy has been mailed to Jennifer Daniel by 4pm January 22, 2018. Court notes that if Steven Cumming does not comply with this order, court will dismiss his petition that is currently set for March 27, 2018. Steven Cumming states to the court that he understands this order and the consequence for not complying with the order. Court sets the deadline for the filing of any additional documents on the Petition to Establish that is currently set for hearing on all parties present in courtroom today state that they understand this order. Court sets briefing schedule on the second and final account of Natalie Blickenstaff as court sets deadline for the filing of any objection to the second and final accounting for 4pm February 14, 2018.

THIS CASE IS SET FOR HEARING ON Receipt of Remittitur

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

1. Remittitur filed 12/14/17. Matter set by Court on 12/20/17 as a remittitur was received, and the judgment was reversed in parts and affirmed in parts. Notice sent to parties.
2. **Proof of service filed 01/18/18 by Steven Cumming.**

RECOMMENDATION

Court's discretion.

(lh/nb)

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

DATE: 03/27/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500300

CASE NAME: LA MAE BALDWIN

HEARING:

First and Final Account and Report of JASON M WHITTAKER and
Petition for allowance of fees filed.

COUNSEL:

CHRISTOPHER JOHN WHITTAKER	(TP)...ROBERT A KRASNEY
ILA MAE BALDWIN	(DEC)...
INHERITANCE FUNDING COMPANY IN	(STEVEN D SCHROEDER
JASON M WHITTAKER	(PET)...THOMAS W DOMINICK

XREF: PROPS1700387 (Patricia Diane Baldwin)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees
by Executor, Jason M. Whittaker ["Petitioner"-grandson].

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

1. Accounting period 04/02/15 to 01/31/18.
2. Assets on Hand \$187,976.39 consisting of \$183,976.39 in cash.
3. Statutory fees of \$7,686.38 requested. Calculated.
4. Attorney requests extraordinary fees of \$4,544.50 for services rendered in
connection with the sale of 2 parcels of real property. Billed at \$375/hour for
10.30 hours' attorney time and \$110/hour for 6.20 hours' paralegal time.
Itemized [LF, pgs. 32-35]. JTD.
5. Petitioner does not request reimbursement for costs totaling \$1,195.00.
6. Petitioner requests authority to withhold \$1,500 as a reserve. JTD.
7. ~Proposed Order 02/05/18.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for
04/02/19.

(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: 03/27/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500913

CASE NAME: MTR OF GARRET W BOOTSMA SR

SEE ALSO 6

HEARING:

Hearing Re: OSC RE SANCTIONS FOR 500.00 FOR FAILURE TO APPEAR

COUNSEL:

GARRET W BOOTSMA SR (DEC)...
JIM H BOOTSMA (PET)...PRO/PER

GENERAL INFORMATION:

Set at 1/30/18 hearing due to non-appearance. Court orders Jim H Bootsma to be personally present in court on March 27, 2018.

THIS CASE IS SET FOR HEARING ON **OSC re Sanctions for \$500 for Failure to Appear** on Accounting Review

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

1. Order upon Hearing on First Account Current entered 04/25/17; second account now due starting 12/01/16.
2. **Second Account filed and set for 05/24/18.**

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: STANFORD E. REICHERT

DATE: 03/27/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500913

CASE NAME: MTR OF GARRET W BOOTSMA SR

SEE ALSO 5

HEARING:

Accounting Review by ***

COUNSEL:

GARRET W BOOTSMA SR (DEC)...

JIM H BOOTSMA (PET)...PRO/PER

See matter #5.

(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: 03/27/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501181

CASE NAME: MTR OF ALEJANDRO PADILLA

SEE ALSO 8

HEARING:

Hearing Re: OSC RE SANCTIONS OF 500.00 ON BOTH ADMINISTRATORS

COUNSEL:

ALEJANDRO PADILLA	(DEC)...
DANIELLE A PADILLA	(PET)...PRO/PER
EMILY N PADILLA	(PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by EMILY N PADILLA is GRANTED
\$465.00 for petition for letters of administration on 12/24/15

GENERAL INFORMATION:

Continued from 01/30/18 due to non-appearances. Matter is continued; court sets OSC re surcharge in the amount of \$500.00 for failure to appear on each administrator: Danielle Padilla and Emily Padilla. Court orders co-administrators to be personally present on March 27, 2018. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON **OSC re Sanctions of \$500 on both Administrators** on Petition for Final Distribution upon Waiver of Account and for Fees by Co-Administrators, Danielle A. Padilla and Emily N. Padilla ["Petitioners"].

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

1. Accounting period 07/26/13 to 10/06/17.
2. Assets on Hand \$0.00.
3. All heirs waive accounting. However, waivers reflect Santa Barbara County. Need proper waivers.
4. Petitioners waive statutory compensation.
5. Summary of Account [LF, p. 5] indicates distribution (\$16,306.18) has already been made. There does not appear to be harm to the estate or creditors
6. Need verified supplement indicating if cash has been invested and maintained in an interest bearing account per Pr.C.§ 1064(a)(5).
7. Proposed Order 10/10/17 does not include findings re sole and separate property.
8. Fee Waiver previously granted. Does Court wish to re-visit matter? 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.**

RECOMMENDATION

Need to clear notes 3 & 6 then Court's discretion. If approved, set next hearing for receipts and final discharge for **04/02/19**.

(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/27/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501181

CASE NAME: MTR OF ALEJANDRO PADILLA

SEE ALSO 7

HEARING:

Waiver of account & report of administrator etc Account and Report of DANIELLE A PADILLA, EMILY N PADILLA and Petition for allowance of fees filed.

COUNSEL:

ALEJANDRO PADILLA	(DEC)...
DANIELLE A PADILLA	(PET)...PRO/PER
EMILY N PADILLA	(PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by EMILY N PADILLA is GRANTED \$465.00 for petition for letters of administration on 12/24/15

See prior matter #7.

(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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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/27/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600855

CASE NAME: ROBERT E OWEN

HEARING:

Accounting Review by ***

COUNSEL:

ROBERT E OWEN

(DEC)...

TIMOTHY PEREZ

(PET)...LAW OFFICE OF KYLE A PATRICK,

XREF: PROPS1400961 (Family trust of Elmer E Reece Hele)

VACATE – First and Final Account filed and set for 04/26/18.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/27/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601053

CASE NAME: MTR OF GERALDINE CASTORENA

HEARING:

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

COUNSEL:

DEPARTMENT OF HEALTH CARE SERVICES (TP)...PRO/PER
FRANK CASTORENA (PET)... BRIAN CULLEN
GERALDINE CASTORENA (DEC)...

Address: 636 Kippy Dr., Colton, CA 92324

Appraised Value: \$110,000.00

Sale price: \$177,000.00

First overbid: \$186,350.00

Deposit: **\$5,000.00. Insufficient. Deposit must be 10% of the purchase prices unless the sale is VA or FHA financed**

Commission: 6% = \$10,620.00

Additional bond: **Currently \$20,000. Suggest increase by \$152,000 for a new bond of \$177,000. JTD.**

Reason for Sale: Necessary to pay debts, expenses of administration, taxes and id to the advantage of the estate and interested persons.

Exposure to Market: Listed on MLS, published, mailings, entertained various bids.

Notice: **Notice does not include buyer, ERE Investments, LLC. Need proper service.**

~Proposed Form Order 12/28/17

Future Hearing: 05/08/18 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: 03/27/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601113

CASE NAME: JOANN MILDRED ROBBINS

HEARING:

Accounting Review by ***

COUNSEL:

JOANN MILDRED ROBBINS (DEC)...

KATHY ROBBINS (PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued to daughter, Kathy Robbins on 03/14/17, full authority, no bond.
2. Need final inventory and appraisal with supporting bank/financial statements to support date of death balance(s).
3. No accounting or updated status report. Need same.
4. Notice of Non-payment by Probate Referee.

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: 03/27/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601173

CASE NAME: GENE A. YOUNG

HEARING:

First and Final Account and Report of TADASAY A ROBINSON and
Petition for allowance of fees filed.

COUNSEL:

CA VICTIM COMPENSATION BOARD (TP)...PRO/PER

GENE A YOUNG (DEC)...

TADASAY A ROBINSON (PET)...STANLEY R HARTFORD

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Administrator, Tadasay A. Robinson ["Petitioner"-daughter].

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

1. Accounting period 09/07/16 to 10/30/17
2. Assets on Hand \$133,902.53 consisting of cash.
3. Statutory fees of \$11,758.00 requested. Calculated.
4. Petitioner requests reimbursement of costs advanced of \$2,805.25. Itemized [LF, p. 21].
5. Disbursements – Schedule C includes a car payoff in the amount of \$1,636.93. Need further clarification via verified supplement as inventories did not include a vehicle.
6. Seller's Final Settlement Statement [LF, p. 20] includes "Credit in lieu of any and all repairs" in the amount of \$40,000, Need further clarification via verified supplement.
7. Need copies of bank/financial statement to support date of death and closing balances per Local Rule 20-908.
8. Notice filed on 01/08/15 reflects incorrect hearing date. Need proper notice.
9. Proposed Order 12/21/17 does not include findings re: all taxes having been paid.

RECOMMENDATION:

Need to clear notes 5-9 then Court's discretion. If approved, set next hearing for receipts and final discharge for **04/02/19**.

(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: 03/27/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1701023

CASE NAME: JACQUELINE MARIE LEMAITRE

HEARING:

Spousal Property Petition hearing.

COUNSEL:

BERNARD JEAN LEMAITRE

(PET)...PRO/PER

JACQUELINE MARIE LEMAITRE

(DEC)...

GENERAL INFORMATION:

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

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Bernard J. Lemaitre ["Petitioner"].

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

1. Petitioner requests a determination of property passing to the surviving spouse as community property. Specifically, 2 parcels of real property in San Bernardino County, an automobile, checking account and brokerage account. However, petitioner does not set forth facts sufficient to establish a community property interest in the real and personal property. When were petitioner and decedent married? How were the property interests acquired – with community funds, etc? **Supp. (03/02/18) indicates parties were married on 04/15/61 in France; married for more than 56 years; and purchase of the real and personal property were made from joint community accounts. Supp. includes copy of marriage certificate and statements reflecting accounts held in both names.**
2. Tax Collector Property Information affixed to petition [LF, p. 14] reflects the Rancho Cucamonga real property held as a "Tenancy in Common" and E*Trade Statement [LF, p. 18] indicates account is already held as community property.
3. Petition includes a copy of Decedent's Statutory Will [LF, p.7].
4. ~Proposed Form Order 10/11/17

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: STANFORD E. REICHERT

DATE: 03/27/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800021

CASE NAME: Betty Jean Melendez

HEARING:

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

COUNSEL:

BETTY JEAN MELENDEZ (DEC)...

RICHARD MELENDEZ (PET)...LAW OFFICES OF DANIEL J. TRIPA

GENERAL INFORMATION:

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

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

1. Section 2a to petition [LF, p. 2] requests decedents will be admitted; however, caption requests letters of administration. **Need** verified supplement.
2. Section 5b to petition [LF, p. 4] does not indicate whether Decedent was survived by stepchild et seq. **Need** verified supplement.
3. Section 8 to petition [LF, p. 5] does not include petitioner. **Need** same.
4. Section 9 to petition [LF, p.5] does not indicate the number of pages attached. **Need** verified supplement.
5. Petition alleges all heirs waive bond. **Need** Mandatory Waiver of Bond by Heir or Beneficiary, form DE-142/DE-111 by Petitioner.
6. Estimated estate valued at \$170,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
7. **Need** proof of publication.
8. ~Proposed Form Order 03/08/18

RECOMMENDATION:

Need to clear notes 1-5 & 7 then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **06/04/19**. 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: 03/27/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800022

CASE NAME: Rodney Steven Hair

HEARING:

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

COUNSEL:

RODNEY STEVEN HAIR (DEC)...

WILLIAM EDWARD BAUM (PET)...VOORHEES & RATZLAFF LAW

GENERAL INFORMATION:

Continued from 02/06/18 for notes to be cleared. Court notes that it finds that the notary on the Nevada will is sufficient; proof of subscribing witness is not required.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration w/WA and full authority under IAEA by William E. Baum ["Petitioner"].

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

1. Petitioner indicates the purpose of filing this probate is to obtain standing in an 850 petition as a caretaker has taken possession of decedent's property.
2. Proposed personal representative is a nominee of a person entitled to Letters. Declination to Act and Nomination of this petitioner by second named executor, Attorney Alice S. Denton, affixed [LF, p. 15-16].
3. Petition alleges all heirs waive bond. Need Mandatory Waivers of Bond by Heir or Beneficiary, form DE-142/DE-111 by beneficiary, Marla I. Gonzalez.
4. Estimated estate valued at \$0.00. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). JTD.
5. ~Proposed Form Letters 02/01/18

RECOMMENDATION:

Need to clear notes 3 then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **06/04/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

FUTURE HEARING DATES: 04/12/18 Petition for determination that PP & RP be found to belong to the estate & that title to property be transferred.

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: 03/27/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800182

CASE NAME: MTR OF OKEY SELMAN

HEARING:

Petition to determine succession to Real Property

COUNSEL:

ANNA SELMAN (PET)...F ELLIOT GOLDMAN
OKEY SELMAN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by Trustee, Anna Selman ["Petitioner"-spouse].

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

1. Inventory & Appraisal attached to petition does not include character of real property at Attachment 2. Need verified supplement.
2. Petitioner is the purported trustee of a trust that is a devisee under decedent's will. Petitioner request determination that decedent's real property at Highland, CA located in San Bernardino County pass to petitioner without administration. Petitioner is decedent's wife; named executrix; and the will conditionally incorporates decedent's Trust. Does Court wish to require a certification of trust that meets the requirements in Pr.C.§18100.5 and additionally includes a list of Trust beneficiaries for notice purposes? Does Court also wish to require a copy of decedent's Trust? JTD
3. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear note 1 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: STANFORD E. REICHERT **TRUSTS AND MOTIONS**

DATE: 03/27/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1301068

CASE NAME: The Robert Bruce Cumming & Lois Wielen Cumming tru

SEE ALSO 3

HEARING:

Final Account and Report of STEVEN ROBERTSON CUMMING and
Petition for allowance of fees filed.

COUNSEL:

JANET ANNE CUMMING	(PET)...EDWARD B FISCHER &
NATALIE BLICKENSTAFF	(PET)...JENNIFER M DANIEL
NATALIE BLICKENSTAFF	(SC)...JENNIFER M DANIEL
ROBERT BRUCE CUMMING & LOIS WI	(TRU)...
STEVEN ROBERTSON CUMMING	(APP)...PRO/PER
STEVEN ROBERTSON CUMMING	(RES)...PRO/PER
US SPECIALTY INSURANCE COMPANY	(PRO/PER
WILLIAM HENRY CUMMING	(PET)...EDWARD B FISCHER &

Request for Waiver of Court Fees and Costs filed by JANET ANNE CUMMING is GRANTED
Request for Waiver of Court Fees and Costs filed by STEVEN ROBERTSON CUMMING is GRANTED
Request for Waiver of Court Fees and Costs filed by WILLIAM HENRY CUMMING is GRANTED
Request for Waiver of Court Fees and Costs filed by STEVEN ROBERTSON CUMMING is GRANTED

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

THIS CASE IS SET FOR HEARING ON Petition to Establish Beneficiary William Henry Cumming's Final Distribution from the Deemed Settlement and Request to be Deemed Final and Conclusive Accounting.

Currently under review by Legal Research.
(LR)

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 **CONSERVATORSHIP**

DATE: 03/27/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700050

CASE NAME: MTR OF KATHERINE POWELL

HEARING:

Hearing Re: OSC RE DOCUMENTS FROM DR ASHISH MALHOTRA

COUNSEL:

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

XREF: CONPS1700074 (Willard Powell)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re: Documents from Dr. Ashish Malhotra.

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

1. Matter set at 03/12/18 hearing, wherein, the Court authorized an OSC to be set if documents from Dr. Ashish were not received by 03/20/18.

RECOMMENDATION:

Court's discretion

(nb)

Future Hearing:

04/03/18 Petition for appointment of conservator

04/03/18 Hearing re: Amended petition for appointment of etc.

04/03/18 Court Trial

Superior Court of Calif, County of San Bernardino

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

DATE: 03/27/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700074

CASE NAME: MTR OF WILLARD POWELL

HEARING:

Hearing Re: DOCUMENTS FROM DR. ASHISH MALHOTRA

COUNSEL:

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

XREF: CONPS1700050 (Katherine Powell)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re: Documents from Dr. Ashish Malhotra.

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

1. Matter set at 03/12/18 hearing, wherein, the Court authorized an OSC to be set if documents from Dr. Ashish were not received by 03/20/18.

RECOMMENDATION:

Court's discretion
(nb)

Future Hearing:

04/03/18 Petition for appointment of conservator
04/03/18 Court Trial

Superior Court of Calif, County of San Bernardino

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

DATE: 03/27/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700463

CASE NAME: LORENA QUIROZ

HEARING:

Hearing Re: CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:

CRISTINA QUIROZ	(CP)...
LORENA QUIROZ	(CTP)...
LORETO QUIROZ	(CP)...
MARIA QUIROZ	(CP)...PRO/PER

GENERAL INFORMATION:

Parents, Maria and Loreto Quiroz and sister, Cristina Quiroz appointed Limited Co-Conservators of the person on 10/01/09.

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. Conservatee is developmentally disabled. Need appointment of counsel and report by same.
2. Need IRC Report.
3. Last CI Report filed 10/05/17 in LA County. Need CI Report.
4. Need to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).
5. ~Proposed Form Letter 02/06/18

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: 03/27/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800041

CASE NAME: MTR OF FRANK PLASENCIA

HEARING:

Petition for Appointment of Conservator

COUNSEL:

FRANK PLASENCIA	(CEP)...
JIM PLASENCIA	(CPE)...PRO/PER
KRISTIN VILLANUEVA	(CPE)...PRO/PER

GENERAL INFORMATION

Ex Parte Orders granted 02/26/18, person and estate, no bond.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by daughter, Kristin Villanueva and son, Jim Villanueva ["Petitioners"].

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

- 1 Petitioners request bond to be determined. Suggest bond of \$381,000 (includes recovery). JTD.
- 2 Petitioner seeks medical powers. Capacity Declaration has the following issues:
 - a. Section 2 does not include physician's phone number;
 - b. Section 4 does not include proposed conservatee's name or the last time physician saw him;
 - c. Number 8 does not include number of pages attached;
 - d. Number 10 to Dementia Attachment does not include number of pages attached.**Need** completed Capacity Declaration.
- 3 Petitioner requests dementia powers; **need** appointment of counsel and report by same.
- 4 Court Investigator's Report filed.
- 5 **Need** return of Citation.
- 6 **Need** Certificates of Completion re Conservatorship Class.
- 7 **Need** Notice of Hearing with proof of service.
- 8 ~Proposed Form Order/Letters 02/09/18.

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 **10/30/18** 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 **06/04/19**. 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: 03/27/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800042

CASE NAME: XAVIER BONILLA

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ESPERANZA BONILLA (PET)...PRO/PER
XAVIER BONILLA (CTP)...

GENERAL INFORMATION

Ex Parte Orders granted on 02/26/18, person only, no bond. By agreement of petitioner, Court amends both petitions for temporary and general conservatorship to be for the person only and removing request for estate powers as petitioner indicates that the proposed conservatee does not have assets or real property.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person by mother Esperanza Bonilla ["Petitioner"].

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

1. No bond - PG.
2. Section f & g to petition re 2351 powers and medical powers are not marked. **Need** verified supplement.
3. Section 5f to petition does not indicates whether proposed conservatee is or is not developmentally disabled. **Need** verified supplement.
4. Section 9d does not indicate whether proposed conservatee is an adherent of a religion that relies on prayer alone for hearing. **Need** verified supplement.
5. Proposed conservatee appears to be developmentally disabled. If so, **need** appointment of counsel and report by same.
6. This petition is for a general, and not limited, conservatorship. An IRC report is therefore optional per Pr.C. 1827.5(b). Does court wish to require? JTD.
7. 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 conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed conservatee, including those in the possession of the Regional Center, authority to control the right of

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.**

the proposed conservatee to contract, authority to make and consent to all medical decisions for the proposed conservatee.

8. Petitioner seeks medical powers. **Need** Medical Capacity Declaration.
9. Court Investigator's Report filed.
10. **Need** return of Citation.
11. **Need** Certificate of Completion re Conservatorship Class.
12. **Need** Notice of Hearing and proof of service.
13. ~Proposed Form Order/Letters 02/09/18.

RECOMMENDATION:

Court to appoint counsel then need to clear notes. If approved, set hearing for Compliance Review for **10/30/18** 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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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PA

DATE: 03/27/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1100392

CASE NAME: Patricia Ann Howerton

HEARING:

Accounting Review by ***

COUNSEL:

BRASWELL'S MEDICAL CONSULTANTS	(TP)...SANDERS, COLLINS &
PATRICIA ANN HOWERTON	(DEC)...
RAUL GARCIA	(PET)...BETTY AUTON-BECK
S.B. COUNTY PUBLIC ADMINISTRAT	(PET)...CRAIG M PARKER
STEVEN EUGENE HOWERTON	(PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by STEVEN EUGENE HOWERTON is GRANTED

GENERAL INFORMATION

Continued from 12/14/17 at request of counsel. Additional time needed to file final accounting. Steven Howerton states objections to continuance on the record. Court finds: Over Steven Howerton's objections, the Court grants counsel's request for continuance.

THIS CASE SET FOR HEARING ON Accounting Review/Status.

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

1. Letters of **Successor** Administration issued to Public Administrator, on 02/11/15; full authority, on bond.
2. **Need** accounting or status report.

RECOMMENDATION

Inquire status of accounting.

(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: STANFORD E. REICHERT

DATE: 03/27/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1300422

CASE NAME: DEBRA MARY SAVAGE-EVANS

HEARING:

FIRST AND FINAL Account and Report of DIANE M SCHUMANN and
Petition for allowance of fees filed.

COUNSEL:

DEBRA MARY SAVAGE-EVANS	(DEC)...
DIANE M SCHUMANN	(PET)...MARIA G NICIFOROS
MARIA G NICIFOROS ESQ	(TP)...
SAN BERNARDINO COUNTY PUBLIC A	(PET)...CRAIG M PARKER

GENERAL INFORMATION:

Petitioner's powers of administration were suspended on 02/01/16.

Letters of Special Administration issued to PA on 04/06/16.

Continued from **05/10/16 and 07/26/16**. Court notes that the notice of proposed action was filed on 09/30/13.

Continued from **10/11/16** at request of counsel. Oral report by Craig Parker.

Continued from **11/29/16, 01/17/17 and 03/28/17**. Oral report given by Craig Parker.

Continued from **06/13/17 and 09/19/17** at request of Maria G Niciforos. Counsel indicates that Kent Savage has also passed away.

Continued from **12/19/17**. Supplement to be filed by 01/09/18; counsel to provide revised order.

Continued from 01/30/18 at request of counsel for notes to be cleared.

THIS CASE IS SET FOR HEARING ON **Amended (05/04/16)** First and Final Account and Petition for Fees.

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

1. Accounting period 01/30/13 to 03/28/16.
2. Assets on Hand \$46,711.76 in cash.
3. Petitioner requests statutory fees of \$11,551.52. Calculated.
 - a. Petitioner requests this Court allow statutory compensation less \$12,590.01, the amount Petitioner previously inadvertently erroneously reimbursed and paid herself, leaving a balance due to the Estate by Petitioner of \$1,038.49

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.**

to be paid by Petitioner and collected by PA. **Supp. (11/29/16) represents the balance due was mailed to PA on 10/07/16.**

4. Attorney requests reimbursement of the outstanding balance for costs advanced of \$765.00. Itemized [LF, p.79].
5. Attorney requests statutory fees of \$11,551.52 less the amount of \$1,000.00 due to Craig Parker. JTD.
6. Petitioner indicates she used the services of Michelle Boyes who assisted with preparation for sale of the house and requests the court approve the sum of \$5,382.50 as compensation. Billed at \$15/hour. Itemized [LF, pgs. 60-64]. Petitioner requests Craig M. Parker to pay Ms. Boyes for such services.
7. George Ross was inadvertently overpaid by the Petitioner for his mileage (\$707) and for fees (\$313) totaling \$1,020.00 and has agreed to reimburse the Estate forthwith.
8. Amended Account (05/04/16) indicates partial distribution was made to petitioner, consisting of the 2004 Saturn, with the approval of PA, Craig Parker. The value of the vehicle (\$2,500) will be deducted from Petitioner's ultimate share of the estate. Petitioner requests transfer of vehicle to her as a devisee by Craig. M. Parker. **Receipt by Diane M. Shuman for pink slip to vehicle filed 11/29/16.**
9. Petitioner requests authority for Craig M. Parker to pay four Creditor's Claims that were presented and approved in the amounts of \$3,847.26; \$2,086.27; \$778.81; and \$666.01.
10. Under the terms of the Will admitted on 06/27/13, Decedent specifically left all personal assets to Petitioner. However, there is no mention of to whom the real property was to be distributed and there is no residual clause. Petitioner believes it was the intent of Decedent to leave the entire Estate to Petitioner, but submits the matter to the Court and presumes that the Court will find that the net sale proceeds of the house should be distributed to Decedent's father. John Savage.
 - a. On 02/02/15, John Savage, father of Decedent and heir at law, passed away. Petition requests PA, Attorney Parker, be authorized and directed to distribute to the heirs of John D. Savage, father of Decedent. If approved, Court to require Pr. C. § 13100 petitions.
 1. **Supp. (01/11/18)** indicates Kent Savage is alive; institutionalized; and another Pr. C. §13100 Petition has been sent to the PG for Kent Savage. **Pr. C. §13100 signed by Kent Savage filed.**
 2. **Supplement (01/11/18) indicates no Pr. C. §13100 petition has been sent to either of Kent Savage's siblings, Terri Kessler and Kelly Hornbeck, because their whereabouts remain unknown and amends proposed distribution. Question how a Pr. C. §13100 can be effected as Terri Kessler and Kelly Hornbeck's whereabouts are unknown?**
11. Petitioner requests her powers to be reinstated and that she performs all acts necessary to close out the Estate.
12. Notice given.
13. Notice of non-payment of bond 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.**

14. Proposed Order 01/11/18 distributes Terri Kessler and Kelly Hornbeck's shares to be held by Craig M. Parker.

RECOMMENDATION:

Need to clear note 10a(2) then Court's discretion as proposed distribution does not appear viable. If approved, set next hearing for receipts and final discharge for

04/02/19.

(nb/lh/nb)

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

DATE: 03/27/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1500010

CASE NAME: Dorothy G Chambers

SEE ALSO 24

HEARING:

Accounting Review by ***

COUNSEL:

DOROTHY G CHAMBERS	(DEC)...
PUBLIC ADMINISTRATOR	(CRAIG M PARKER
STATE OF CALIFORNIA FRANCHISE	(TP)...PRO/PER
TRENT S WILLIS	(PET)...PRO/PER

GENERAL INFORMATION

Continued from **04/12/16**. The Court finds a Notice of Sale of Real Property was filed 2/16/16. Administrator has limited powers with no authority to sell the property. Court suspends powers to Administrator. Court appoints Public Administrator as Special Administrator. Administrator, Trent S. Willis is ordered to return. Notice given by Judicial Assistant.

Continued from 06/28/16 and 09/13/16. Citation issued to: Trent Williams.

Continued from **11/22/16**. Oral report given by Craig Parker. Court removes Trent Willis as administrator and court appoints Public Administrator as successor administrator.

Continued from **02/07/17**. Citation reissued as to Trent S. Willis who is required to appear.

Continued from 05/02/17. Court sets OSC re Surcharge/Sanctions (see prior matter). Notice by Judicial Assistant.

Continued from 06/06/17. Court makes note for future hearing with respect to any excess proceeds to Public Administrator from the foreclosure sale. Court re-issues another OSC re Sanction/Surcharge on Trent Willis for 08/15/17 in amount of \$2,500. Court continues hearing to 08/15/17 at request of Counsel. Notice given by Judicial Assistant.

Continued from 08/15/17 on court's motion for filing of account by Trent S. Willis. Notice by Judicial Assistant.

Continued from 11/07/17. Trent Willis failed to appear. Court imposed sanctions of \$5,000 to be paid to estate; no deadline set for payment of sanctions. Oral report was given by Craig Parker, attorney for public administrator, as to real

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.**

property. Counsel indicates there were excess proceeds from sale of property. Matter continued to be heard on date of accounting review for public administrator.

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

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

- 1 Letters of Administration issued 02/10/15, LIMITED authority, no bond.
- 2 **Need** accounting or status report of administration.
- 3 Review of laser fiche indicates a Notice of Sale of Real Property filed on 02/16/16 by pro per administrator. However, this type of notice is incorrect as administrator has LIMITED powers that would require a noticed hearing and court authorization. Court may wish to set a control hearing and suggest administrator obtain legal advice. JTD.
- 4 Affidavit of Unsuccessful Service filed 10/13/16. **Need return of re-issued Citation.**

RECOMMENDATION:

Need to clear note 4. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq.
(nb/lh/nb)

Future Hearing:

04/17/18 Probate status report

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 03/27/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1500010

CASE NAME: Dorothy G Chambers

SEE ALSO 23

HEARING:

Accounting Review by ***

COUNSEL:

DOROTHY G CHAMBERS

(DEC)...

PUBLIC ADMINISTRATOR

(CRAIG M PARKER

STATE OF CALIFORNIA FRANCHISE

(TP)...PRO/PER

TRENT S WILLIS

(PET)...PRO/PER

VACATE – Status Report filed by PA and set on 04/17/18.

(lh/nb)

Future Hearing:

04/17/18 Probate status report by PA

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: 03/27/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1500172

CASE NAME: JOVAL D. CARRADINE

HEARING:

Accounting Review by ***

COUNSEL:

JONATHAN E SMITH (PET)...PRO/PER

JOVAL D CARRADINE (DEC)...

GENERAL INFORMATION:

Continued from 01/02/18 at request of counsel for PA.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued 11/18/16, full authority, no bond.
2. No accounting or status report of administration. 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: 03/27/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1500646

CASE NAME: CHERRAKEE LEE GROETZINGER

HEARING:

Accounting Review by ***

COUNSEL:

CHERRAKEE LEE GROETZINGER	(DEC)...
DEPARTMENT OF HEALTH CARE SERV	(TP)...PRO/PER
LON M ANDERSON	(PET)...PRO/PER
SUSAN C BUCKELEW	(PET)...PRO/PER

GENERAL INFORMATION:

Set on **10/31/16** due to non-appearance. Notice by Judicial Assistant.

Continued from **01/09/17**. No appearance. Court notifies the Public Administrator of possible appointment.

Continued from 01/10/17 at request of counsel. Public administrator to conduct investigation.

Continued from **03/07/17**. Citation issued to Lon Anderson, who is cited to appear on 05/16/17 and show cause why FTA/failure to file required documents.

Matter set on **06/16/17**. An accounting is ordered to be filed by 07/01/17.

Continued **08/01/17**. Lon Anderson to file date of death bank statements with the Court. Court orders Susan Buckelew to be present personally or by court call at next hearing.

Continued from **09/26/17** to allow Lon Anderson to file an accounting and for Susan C. Buckelew to appear as previously ordered. Notice given by Mr. Parker.

Continued from 11/21/17 and 01/16/18 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued 08/24/15, full authority, no bond.
2. Final inventory and appraisal filed.
3. Declaration filed 05/16/17 by Lon Anderson.
4. No accounting or status report of administration. Need same.

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:

Inquire status.
(nb/lh/nb/lh/nb)

Future Hearing:
09/04/18 Accounting Review (by Successor)

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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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 03/27/18 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1500701

CASE NAME: FRANK PELLEGRINO JR
SEE ALSO 28, 29

VACATED

HEARING:
Hearing Re: CREDITOR'S CLAIM

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

XREF: FAMSS 1703685 (Mary L Pellegrino-n-Frank Pellegrino Jr)

Future Hearing:
03/28/18 Mediation settlement conference

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

DATE: 03/27/18 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1500701

CASE NAME: FRANK PELLEGRINO JR
SEE ALSO 27, 29

VACATED

HEARING:

Hearing Re: VERIFIED PTN FOR JUDGMENT ON CREDITOR'S CLAIM

COUNSEL:

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

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

Future Hearing:

03/28/18 Mediation settlement conference

Superior Court of Calif, County of San Bernardino

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

DATE: 03/27/18 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1500701

CASE NAME: FRANK PELLEGRINO JR

SEE ALSO 27, 28

VACATED

HEARING:

Hearing Re: PTN BY D. NEUHAUS FOR ORDER TERM INSOLV TRUST

COUNSEL:

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

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

Future Hearing:

03/28/18 Mediation settlement conference

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: 03/27/18 TIME: 8:30 DEPT: S36P

CASE#: PRO DS1000106

CASE NAME: MTR OF SIV LJUNGWE

HEARING:

Hearing Re: Status of second & final account by S. Dimeff

COUNSEL:

ALEX R BORDEN	(PET)...BORDEN LAW OFFICE
ALEX R BORDEN	(PET)...PRO/PER
ANDERS L LJUNGWE	(BURKLEY & BRANDLIN LLP
MARILYN KRIEBEL	(PET)...KEENEY WAITE & STEVENS
NPR FOUNDATION, SAN DIEGO STAT	(TP)...LUCE HOWARD HAMILTON &
SIV H LJUNGWE	(DEC)...
SUZANNE C. DIMEFF	(PET)...DIMEFF LAW OFFICE LLP
SUZANNE COWAN DIMEFF	(PET)...LAW OFFICE OF KIRK MILLER

GENERAL INFORMATION

Matter reset on 2/1/17, court noted that 2nd and Final Account filed by Suzanne Dimeff, matter is contested and set for 08/16/17. Status of account was set for this date.

Continued from 03/30/17, 06/29/17 and 07/06/17. **Matter is contested and set for trial.**

Continued from **09/21/17**. Matter set for status to set mediation date.

Continued from 10/19/17 and 12/07/17. Matter is contested. Notice waived.

THIS CASE SET FOR HEARING ON Second Amended **(03/24/16)** First and Final Account by **prior administrator, Suzanne Cowan Dimeff:**

1. Accounting period 01/16/10 to 11/24/15 (5.10 years)
2. Zero assets on hand.
3. Partial No.1 and corrected I&As filed. **Need** Final Inventory and Appraisal.
4. Petitioner does not seek compensation.
5. Petitioner requests extraordinary fees of \$81,993.00 for years of work, and reimbursement of costs totaling \$41,872.46 including cost of legal counsel which her law firm advanced [LF, p. 41-49]. Billed at the lower rate of \$375 /hour for attorney time, \$65/hour for administrative support and reduced paralegal fees of \$75/hour. Itemized [LF, pgs. 29-40]. 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.**

6. Petitioner requests the total amount of compensation in the sum of \$123,865.46 to be a lien against Trust Assets. JTD.
7. Petitioner informs the Court that Successor Personal Representative, Alex Borden, was appointed Special Administrator by Ex Parte Application, without bond on 11/06/14, for the express purpose of substituting into Los Angeles Civil Action, Case Number YC069475, wherein, the petitioner estimates the value of decedent's one-half interest in these community property assets in exclusive control of the estranged spouse to be \$1,694,500.00. Petitioner indicates that on 06/26/15, with no Notice or explanation to this Court, Administrator Borden dismissed this Civil Action, without prejudice. Estranged spouse, Anders Ljungwe then transferred a \$1M annuity, titled in the name of the Ljunge Family Trust, and declared by Siv Ljungwe as having her one-half interest funded into her separate trust, and into his personal name. Does Court wish to set a Surcharge Hearing? JTD
8. Copy of the Siv Ljungwe Trust filed 06/24/10 and 07/06/15.
9. **Objections to First Accounting filed 6/1/15 by Alex Borden administrator, CTA to prior accounting. Supplement to Objections filed 8/19/15**
10. **Response to Objections filed 09/03/15 and 09/13/16 by Suzanne Dimeff.**
11. **Objections to 2nd Amended First Account filed 9/6/16 by Marilyn Kriebel.**
12. **Notice of lodgment in support of objections filed on 09/07/16.**
13. **Request for judicial notice filed 10/28/16 re San Diego Case and appeal.**
14. **Statement of issues filed 10/28/16.**
15. **Status Conference Report filed by Marilyn Kriebel.**

RECOMMENDATION:

Need to clear note 3. Matter is opposed. If approved, set hearing for receipts and final discharge for **04/08/19**.

(sa/lc/ww/nb)

Future Hearing:

04/05/18 Final Discharge

Superior Court of Calif, County of San Bernardino

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

DATE: 03/27/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500564

CASE NAME: Annabelle Childress

HEARING:

First and final Account and Report of CATHERINE ROUNTREE and
Petition for allowance of fees filed.

COUNSEL:

ANNABELLE CHILDRESS	(DEC)...
CATHERINE ROUNTREE	(PET)...BERT Y KAWAHARA
CATHERINE ROUNTREE	(PET)...LINDA ROBERTS ROSS
CLORINDA CHILDRESS	(TP)...PRO/PER
REGINA NITASHA HOWARD	(PET)...PRO/PER

GENERAL INFORMATION:

Continued from 01/24/18 at request of court. Oral report given by Atty Linda Roberts-Ross. Ms. Childress to be present/written objections to be filed. Counsel for Petitioner to give notice.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Catherine Rountree, administrator

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

1. Assets on hand: \$218,350.91, cash
2. Petitioner seeks statutory compensation of \$11,661.98.
3. Attorneys request statutory fees of \$11,661.98. Calculated.
 - a. Attorney Bert Kawahara was initially hired to represent the administrator but was later substituted for attorney Linda Roberts-Ross. The attorneys seek court approval of their attached stipulation to split statutory fees in the amount of **\$1,000 to Mr. Kawahara**, and remaining **\$10,661.98 to Ms. Roberts-Ross**. [Accounting, 10/27/17, LFpg195-197]. **JTD**.
4. Attorney seeks extraordinary fees in the amount of **\$11,789.80**, including **\$513.80** for costs advanced for representation of administrator for litigation regarding will contest and unlawful detainer action. Itemized. [Accounting, 10/27/17, LFpg189-193]. **JTD**
5. Petitioner requests reserve of **\$2,000** for final closing expenses. **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.**

6. Petitioner requests reimbursement of **\$16,582.87** for costs advanced to estate. Itemization and receipts attached at Exhibit E. [Accounting, 10/27/17, LFpg149]. **JTD**
7. **Need** bank statement re CitiBank acct #3464 verifying assets on hand per Local Rule 20-908. **Supp. (01/23/18) does not include statement as alleged. Need same.**
8. No written objections as of the review of this matter.
9. ~Proposed Order 01/23/18 re Stipulation re Allocation of Funeral Expenses for Decedent.
10. Proposed Order 01/23/18 reflects incorrect reimbursement on page 2, paragraph 8; exonerates bond and closes estate upon filing of receipts instead of upon entry of a final discharge order.

RECOMMENDATION:

Need to clear notes 7, then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **06/05/19**.

(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: 03/27/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500995

CASE NAME: LI-CHIN CHAN CHENG

HEARING:

Hearing re Final Discharge

COUNSEL:

KEVIN CHEN LU CHAN (PET)...TOMOHIRO J KAGAMI

LI-CHIN CHAN CHENG (DEC)...

VACATE – Declaration and Order for Final Discharge entered 08/22/17.

(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: 03/27/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1501155

CASE NAME: THE GEORGE NEWMAN LIVING TRUST 2009

SEE ALSO 5

HEARING:

Petition for Approval of Settlement Agreement

COUNSEL:

CHRISTINE LARSON	(PET)...LAYNE A BARTHOLOMEW
CHRISTINE LARSON	(RES)...
CHRISTINE LARSON, TRUSTEE	()...
JASON LARSON	(PET)...MICHAEL B HICKEN
JOSHUA LARSON	(MIN)...
MATTHEW LARSON	(MIN)...
THE GEORGE NEWMAN LIVING TRUST	(TRU)...

Currently under review by Legal Research.

(LR)

Continued matter – notice not re-reviewed.

(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

DATE: 03/27/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1501155

CASE NAME: THE GEORGE NEWMAN LIVING TRUST 2009

SEE ALSO 4

HEARING:

FIRST Account and Report of CHRISTINE LARSON and Petition for allowance of fees filed.

COUNSEL:

CHRISTINE LARSON (PET)...LAYNE A BARTHOLOMEW
CHRISTINE LARSON (RES)...
CHRISTINE LARSON,TRUSTEE ()...
JASON LARSON (PET)...MICHAEL B HICKEN
JOSHUA LARSON (MIN)...
MATTHEW LARSON (MIN)...
THE GEORGE NEWMAN LIVING TRUST (TRU)...

GENERAL INFORMATION:

Continued from **07/26/16, 10/11/16, 01/17/17 and 04/04/17** at request of counsel.

Guardian ad litem represents parts of the funds are being recovered.

Continued from **06/06/17 and 08/08/17**. Counsels are working on a settlement to be filed.

Continued from 10/10/17, 11/27/17, and 02/13/18 at request of counsel to finalize settlement agreement.

THIS CASE IS SET FOR HEARING ON First Account Current by Successor Trustee, Christine Larson; Response and Objection to Petition for Removal of Trustee and Appointment of Successor Trustee for Redress of Breach of Trust including Punitive Damages.

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

1. Accounting period 06/30/11 to 02/29/16 (5.8 years).
2. Assets on Hand \$685,692.39 consisting of \$495,181.67 in cash and \$190,510.72 in equities, securities and bonds
3. Disbursements – Schedule C11 reflects multiple loans to Petitioner and payments from the trust in order to purportedly make ends meet during the dissolution of marriage proceedings and to enable Petitioner to settle demands

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.

for cash offsets by Jason Larson in the dissolution of marriage settlement [LF, p. 110]. Petitioner alleges she was advised that the sections titled “Trustee Self-Dealing – Loan, Buy, Sell” and Trustee and Executor Transactions – Self Dealing Permitted” and the section titled “Loan” of the trust allowed her to loan money to herself from the trust for any purpose and that she did not have to provide any security for the loans. Copy of trust affixed to petition filed 12/09/15.

4. Schedule I1 [LF, p. 99-101] reflects funds to be reimbursed to Trust by Trustee totaling \$729,280.90 less offset of \$27,000 for trustee fees pursuant to trust provisions for a total sum of \$695,546.43 to be reimbursed .
5. Notice given.
6. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court’s discretion. If approved, set next hearing for Accounting Review in **60 days** as second account current is now due.

(nb/lh/nb/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

DATE: 03/27/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1501186

CASE NAME: MTR OF ROSE CORRA

SEE ALSO 7

HEARING:

OSC re: SANCTIONS FOR FTA/FAILURE TO FILE AN ACCOUNTING filed by
JOHN PAUL CORRA

COUNSEL:

JOHN PAUL CORRA (PET)...PRO/PER
ROSE CORRA (DEC)...

GENERAL INFORMATION

Continued from 08/16/17. No appearance and no accounting filed. John Corra ordered to appear.

Continued from 10/11/17. Citation to be issued for John Paul Corra for failure to appear and failure to file an accounting; John Paul Corra to be present at next hearing. Should he fail to appear, a bench warrant will be issued.

Continued from 12/06/17. No appearance; no return of citation has been filed with the Court. Court will send another Citation out for John Corra for failure to appear and/or file an accounting as ordered.

Continued from 01/31/18. No appearance. Citation reissued at to John Paul Corra.

THIS CASE SET FOR HEARING ON **OSC re Sanctions for FTA/Failure to File Acct/Accounting review/Status.**

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

1. Letters of Testamentary issued to John Corra, son, on 04/20/16; full authority, no bond.
2. **Need** final Inventory and Appraisal
3. **Need** accounting or status report.
4. **Need** return of citation re John Paul Corra with proof of service. **Proof of unsuccessful service filed 01/24/18. Change of Address received by Post Office on 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

Court's discretion re OSC

Inquire status of accounting and I&A.

(ww/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: 03/27/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1501186

CASE NAME: MTR OF ROSE CORRA

SEE ALSO 6

HEARING:

Accounting Review by ***

COUNSEL:

JOHN PAUL CORRA (PET)...PRO/PER

ROSE CORRA (DEC)...

Request for Waiver of Court Fees and Costs filed by JOHN PAUL CORRA is GRANTED

See prior matter #6.

(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: 03/27/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600094

CASE NAME: RANDY KIMBALL

HEARING:

first and final Account and Report of DONNA LAIRD and Petition
for allowance of fees filed.

COUNSEL:

DONNA LAIRD (PET)...FARHAT LAW FIRM, APC
RANDY KIMBALL (DEC)...

XREF: PROPS1600097 (John Charles Kimball)
GARPS1600363 (Diane Lynn Stover et al)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of
Account and for Fees by Administrator, Donna Laird ["Petitioner"-sister].

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

1. Pages 2-3, & 6 are missing. Need complete accounting.
2. Final inventory filed on 07/13/15 has the following issues:
 - a. Not dated at signature lines;
 - b. Not signed by attorney.Need complete inventory.
3. Disclaimers filed by decedent's siblings are timely in favor of decedent's grandson, Justin Kimball.
4. All heirs waive accounting.
5. Accounting period 07/13/15 to 02/28/17.
6. Assets on Hand \$39,332.88 consisting of \$38,332.88 in cash and remaining in personal property.
7. Statutory fees of \$2,294.65 requested. Calculated.
8. Petitioner requests her Creditor's Claim in the amount of \$8,963.74. Order on Partial Approval of Claim of Personal Representative entered 10/30/17.
9. Attorney requests reimbursement of costs advanced of \$1,480.91. Itemized.
10. Need statement regarding notice to Director of Health Care Services or notice per Pr. C. § 9202(a).

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. Need statement regarding notice to Franchise Tax Board or notice per Pr. C. § 9202(c)(1).
12. Need verified supplement indicating if cash has been invested and maintained in an interest bearing account per Pr.C.§ 1064(a)(5).
13. No proposed order. Submit Order after Hearing with signature by GAL, Donnasue Ortiz, as to form and content.

RECOMMENDATION:

Need complete accounting and 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: JAMES MICHAEL WELCH

DATE: 03/27/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600524

CASE NAME: MTR OF JUAN-EDGAR RAPACON GAPUZAN

HEARING:

First and Final Account and Report of ROCHELLE EVANGELISTA DEL ROSARIO and Petition for allowance of fees filed.

COUNSEL:

ROCHELLE EVANGELISTA DEL ROSAR (PET)...JOSEPH FLOHR

JUAN-EDGAR RAPACON GAPUZAN (DEC)...

VACATED – Amended First and Final Account filed and set on 04/17/18.
(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: JAMES MICHAEL WELCH

DATE: 03/27/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600960

CASE NAME: MTR OF THOMAS R MEYER

HEARING:

Waiver of Account and Report of DORIS NEWBERGER and Petition for allowance of fees filed.

COUNSEL:

DORIS NEWBERGER (PET)...PRO/PER
THOMAS R MEYER (DEC)...

GENERAL INFORMATION:

Continued from 01/24/18 at request of court.

THIS CASE IS SET FOR HEARING ON Waiver of Account and Report, Waiver of Statutory Fees by Doris Newberger, administrator

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

1. Assets on Hand \$22,589.44 consisting of cash.
2. Petitioner waives statutory compensation.
3. Subsequent to the Final Inventory and Appraisal filing on 12/19/16, it was discovered the Bank of America IRA account valued at \$5,262.06 had a named beneficiary and should therefore be excluded as an asset. However, petitioner does not seek statutory compensation. Amended final I&A filed
4. ~Proposed order: 12/12/17

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **04/02/19**.

(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: 03/27/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701076

CASE NAME: RICHARD WESLEY GROVE

HEARING:

Petition for Letters of Administration with Full IAEA

COUNSEL:

CAROLE ANN MARTIN (PET)...PRO/PER

DENNIS M MARTIN (PET)...PRO/PER

RICHARD WESLEY GROVE (DEC)...

GENERAL INFORMATION:

Continued from 01/24/18 at request of court.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Dennis Martin (brother-in-law) and Carole Martin (sister)

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

1. All heirs purportedly waive bond. Estimated net value of estate is \$557,000, consisting of \$107,000 in personal property and remaining in real property. The court may for good cause require that a bond be given, either before or after issuance of letters (Prob. Code, § 8481(b)). JTD
2. Decedent was survived by siblings. Petition, item #8, list of relatives indicates decedent had a predeceased sibling, Joan Brewer. Question if Joan Brewer was survived by issue? **Need verified supplement.**
3. ~Proposed form Order: 10/25/17

RECOMMENDATION:

Need to clear note 2. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **06/05/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(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.**

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

DATE: 03/27/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701264

CASE NAME: MTR OF BERNARD DOMROY

HEARING:

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

COUNSEL:

BERNARD DOMROY (DEC)...
JUDI DOMROY (PET)...BENJAMIN H BERKLEY

GENERAL INFORMATION:

Continued from 01/24/18 at request of counsel.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Judi Domroy, niece

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

1. Bond waived by both heirs. Estimated net value of estate is \$627,485.32, consisting of \$8,581.57, cash, and remaining in real property. Court also has discretion to require bond per Pr. C. § 8481(b).
2. Petition is incomplete at item #3(g)(2) as to relationship to decedent; however, Section 8 indicates is a niece.
3. ~Proposed Form Order 01/16/18.

RECOMMENDATION:

Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **06/04/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(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: 03/27/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800150

CASE NAME: GEORGE SEDIVY JR.

HEARING:

Petition to Determine Succession to Real Property

COUNSEL:

DAWN BARKER	(PET)...GEORGINA LEPE
GAYLENE SEDIVY	(PET)...GEORGINA LEPE
GEORGE A SEDIVY	(PET)...GEORGINA LEPE
KATHLEEN L. SEDIVY	(PET)...GEORGINA LEPE

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by spouse, Kathleen L. Sedivy and issues, George A Sedivy, Gaylene Sedivy and Dawn Barker ["Petitioners"].

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

1. Inventory & Appraisal attached to petition has the following issues:
 - a. Need signatures of verification by all petitioners.
 - b. Attachment 2 does not include character of real property.
Need corrected inventory
2. Petitioners request a determination that decedent's 1/3rd interest in real property located at Highland, CA in San Bernardino County, pass to petitioners without administration. Petitioners are decedent's spouse; children; and heirs per intestate succession.
3. Petition attaches a copy of a Grant Deed [LF, p. 14] reflecting decedent's interest in subject property.
4. ~Proposed Form Order 02/16/18.

RECOMMENDATION:

Need corrected I&A 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: 03/27/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800154

CASE NAME: Sharon L King

HEARING:

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

COUNSEL:

BRADLEY W KING	(PET)...BRYAN C. HARTNELL
DONAJAYNE K POTTS	(PET)...BRYAN C. HARTNELL
SHARON L KING	(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by issues, Bradley W. King and Donajayne K. Potts ["Petitioners"].

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

1. Petitioners request no bond and allege all heirs waive bond. However, need waiver of bond by sibling, Shari Layne M. King. Also, co-petitioner, Bradley W. King is a non-resident and Court has discretion to require bond per Pr. C. §8571. Estimated estate valued at \$305,000. 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 proof of publication.
3. ~Proposed Form Order/Letters 02/20/18.

RECOMMENDATION:

Need to clear note 2 then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **06/04/19**. 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: JAMES MICHAEL WELCH

DATE: 03/27/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800155

CASE NAME: Lucille J Fritcher

HEARING:

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

COUNSEL:

CHERI CAFFARO AZRIEL (PET)...LAW OFFICE OF GEORGINA LEPE
LUCILLE J FRITCHER (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by named executrix, Chero Caffarp Azriel ["Petitioner-daughter"].

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

1. Will waives bond. Estimated estate valued at \$1,865,000.00. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
2. Need proof of publication.
3. Notice filed on 02/27/18 does not include Candi Solomon, Jacob Solomon, Nicoli Solomon, Elizabeth Solomon, or James Emerson Buchanan, Jr. named in Will. Need proper service.
4. ~Proposed Form Order/Letters 02/20/18.

RECOMMENDATION:

Need to clear notes 2-3 then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **06/04/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

DATE: 03/27/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500116

CASE NAME: Robert Sanchez

HEARING:

Accounting Review by ***

COUNSEL:

ROBERT SANCHEZ	(CEP)...
SANDRA WILLIAMS	(OBJ)...PRO/PER
SYLVIA VALENZUELA	(PET)...AVILES & ASSOCIATES

GENERAL INFORMATION

Continued from **10/17/17** on courts motion. Need waiver of account.

Continued from 11/28/17 and 01/30/18. Non-appearance by Attorney Aviles.

Citation issued to: Moses Aviles who is cited and required to appear. Benjamin Selters III is relieved as counsel of record for Robert Sanchez.

THIS CASE IS SET FOR HEARING ON Accounting Review by Conservator of the Person and Estate, Sylvia Valenzuela.

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

- 1 Matter set at 01/03/17 hearing, wherein, the Court approved the waiver of account that was received on 08/25/16; and set this matter for an OSC re termination of the conservatorship of the estate as estate assets consists of SSI funds. All other monies and property are held in the SNT in LA County. **Petition to terminate the conservatorship of the estate granted on 05/16/17.**
- 2 **Need** Second and Final Account beginning 08/20/16 to 05/16/17.
- 3 **Need** to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).
- 4 CI report filed 10/05/17.
- 5 Conservatee resides in Whittier, CA. **Suggest transfer** to LA County. If so, court to set control date.
- 6 **Proof of served Citation filed..**
- 7 ~Proposed Form Order 10/05/17.

RECOMMENDATION:

Need to clear notes 2-3 then Court's discretion re transfer to LA County.

(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: 03/27/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500304

CASE NAME: MARIA DE JESUS LOZANO DE MENDOZA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of DAVID MENDOZA

COUNSEL:

DAVID MENDOZA (PET)...PRO/PER
MARIA DE JESUS LOZANO DE MENDO (CEE)...WALTER T. MOORE

XREF: CONPS1500306 (*Jesus Mendoza Perez*)

GENERAL INFORMATION

Continued from 01/22/18 at request of counsel.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. David Mendoza, son, appointed conservator of the person only on 06/19/17, no bond.
2. **Need** Notification of Conservatee's rights per Pr.C.§1830(c).
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION

Need to clear notes 2-4. If continued, set on Monday calendar as originally set.

(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

DATE: 03/27/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500306

CASE NAME: JESUS MENDOZA PEREZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of DAVID MENDOZA

COUNSEL:

DAVID MENDOZA (PET)...PRO/PER
JESUS MENDOZA PEREZ (CEE)...WALTER T. MOORE

XREF: CONPS1500304 (Maria De Jesus Lozano De Mendoza)

GENERAL INFORMATION

Continued from 01/22/18 at request of counsel.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. David Mendoza, son, appointed conservator of the person only on 06/19/17, no bond.
2. **Need** Notification of Conservatee's rights per Pr.C.§1830(c).
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION

Need to clear notes 2-4. If continued, set on Monday calendar as originally set.

(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

DATE: 03/27/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600365

CASE NAME: MTR OF TEODORICO LAWENKO

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ZOLITA LAWENKO

COUNSEL:

ZOLITA LAWENKO

(CPE)...PRO/PER

TEODORICO LAWENKO

(CEE)...

GENERAL INFORMATION

Continued from **04/10/17, 06/26/17, 08/21/17,10/16/17 and 11/20/17**. Attorney Walter Moore to assist with filing required documents.

Continued from 01/22/18 at request of counsel. Counsel has been unable to contact conservator and notes need to get cleared. The Court orders matter referred to the Court Investigators to find out where the conservator and conservatee reside. Referred to Court Investigator for investigation and report.

THIS CASE IS SET FOR HEARING ON Inventory & Appraisal/Compliance Review

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

1. Zolita Lawenko, spouse, appointed conservator of the person and estate on 02/10/17, no bond.
2. **Need** Notification of Conservatee's rights per Pr.C.§1830(c).
3. **Need** Statement of Care Plan in accord with Pr.C.§2352.5.
4. **Need** Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).
5. **Need** Final Inventory & Appraisal per Pr.C.§2610.
6. **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
7. **Need** CI Report.
8. If the conservatorship estate holds interest in real property, need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313.

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. **NOTE: Notice of Change of Address filed on 05/02/17 indicates Conservator/spouse, Zolita Lawenko, has moved to Jurupa Valley in Riverside County.**

RECOMMENDATION:

Need to clear notes 2-7. When documents are not filed as ordered, court may set a hearing in accord with Pr.C. §2655.

(nb/ww/nb)

Future Hearing:

04/02/18 Accounting Review.

Superior Court of Calif, County of San Bernardino

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

DATE: 03/27/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700144

CASE NAME: MTR OF CHARLIE BRANDON PARDO

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of JUAN CARLOS PARDO

COUNSEL:

AURORA TEMPLETON	(CP)...PRO/PER
CHARLIE BRANDON PARDO	(CTP)...LENITA A SKORETZ
JUAN CARLOS PARDO	(CP)...PRO/PER
KIMBERLY PARDO	(CP)...PRO/PER

GENERAL INFORMATION

Juan C. Pardo (father), Aurora Templeton (mother) and Kimberly Pardo (sister)
appointed Limited Co-Conservators of the person on 08/22/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

- 1 Need proof of service of a copy of the Order for Conservatorship with
Notification of Conservatee's Rights per Pr.C. §1830(c).
- 2 Need Statement of Care Plan in accord with Pr.C. §2352.5.
- 3 Need a Determination of Conservatee's Appropriate Level of Care per Pr.C.
§2352.5 (form GC-355).

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: 03/27/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700234

CASE NAME: MTR OF MIRACLE GARDNER

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of KAM LOVE

COUNSEL:

KAM LOVE

(CP)...PRO/PER

MIRACLE GARDNER

(CTP)...WALTER T MOORE

GENERAL INFORMATION

Kam Love (mother) appointed Limited Conservator of the Person on 08/22/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

- 1 Notification of Conservatee's Rights filed.
- 2 Need Statement of Care Plan in accord with Pr.C. §2352.5.
- 3 Need a Determination of Conservatee's Appropriate Level of Care per Pr.C. §2352.5 (form GC-355).

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: 03/27/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700406

CASE NAME: PROFIRIO ELIAS CASTILLO

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MARIA GRACIA ELIAS (CP)...PRO/PER
PROFIRIO ELIAS CASTILLO (CTP)...JENNIFER DANIEL

GENERAL INFORMATION

Continued from 12/11/17 and 12/19/17. Maria Gracia Elias is appointed Temporary Conservator.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Maria Elias, mother

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

1. No bond- Person only
2. Petitioner seeks medical powers. **Need** Capacity Declaration.
3. List of Required Contacts (Local form SB-12224) indicates that father of proposed conservatee is unknown, but is listed as Providio Castillo in petition. Court to clarify.
4. Duties of Conservator and acknowledgement of receipt of handbook form filed; however, signature is not dated. **JTD**
5. Jennifer Daniel appointed as counsel. Report filed.
6. Citation returned SERVED.
7. **Need** Certificate of Completion of the Conservatorship Training Class
8. **Need** Notice of Hearing and proof of service.
 - a. **Requests to Excuse Notice filed as to father and paternal grandparents. JTD.**
9. CI report filed.
- 10.~Proposed Form Order: 11/02/17

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 & 7-8 then Court's discretion. If approved, set hearing for Compliance Review for **10/29/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5

(ww/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: 03/27/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800036

CASE NAME: JOSEPH ANTHONY VARGAS

HEARING:

Petition for Appointment of Conservator

COUNSEL:

JEANNETTE A JACQUES (PET)...PRO/PER
JOSEPH ANTHONY VARGAS (CEE)...LENITA A SKORETZ

GENERAL INFORMATION:

Ex parte orders granted on 02/21/18. Temporary conservatee excused from future hearings.

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

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

1. Section 8 to petition does not include step-father, Vince Ali. **Need** verified supplement.
2. No bond – person only.
3. Proposed conservatee is developmentally disabled. Report by court-appointed attorney, Lenita Skoretz, filed.
4. Petitioner requests medical powers. Medical Capacity Declaration filed 03/19/18, Section 4 is blank and signatures are not dated. **Need** complete capacity declaration.
5. 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, give and withhold consent to all medical decisions for the proposed limited conservatee.
6. Proof of Service to Citation returned on 02/14/18, sections 3(1)(2) are incomplete as to date and time. **Need** proper 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.**

7. Court Investigator Report filed.
8. Inland Regional Center Report filed.
9. Certificate of Completion re Conservatorship Class filed.
10. ~Proposed Form Order/Letters 03/19/18.

RECOMMENDATION:

Need to clear notes 1, 4, 6 then Court's discretion. If approved, set hearing for Compliance Review for **10/30/18** 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)

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

DATE: 03/27/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800045

CASE NAME: MTR OF ARINNE BAGRO

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CATHERINE BAGRO (CP)...PRO/PER
ARNOLD BAGRO (CP) . . PRO/PER
ARNOLD J BAGRO (CP)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by parents, Catherine and Arnold Bagro, and brother, Arnold J. Bagro.

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, Sandy Turner, filed.
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. Proof of Service affixed to Citation, Sections 3a (1) (2) re: date and time are incomplete and signature is not dated. **Need** proper service.
7. **Need** Court Investigator 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.

8. **Need** Inland Regional Center Report.
9. Certificates of Completion re Conservatorship Class filed
10. No proposed order/letters. Submit after hearing.

RECOMMENDATION:

Need to clear notes 6-8 then Court's discretion. If approved, set hearing for Compliance Review for **10/30/18** 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

PROBATE

DATE: 03/27/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS0600139

CASE NAME: IN RE ESTATE OF CHESTER RAY BURNETT

SEE ALSO 2

HEARING:

Order to Show Cause RE: Sanctions/Removal of Administrator

COUNSEL:

ALVILDA BUSH

(PET)...LENA GHIANNI

CHESTER RAY BURNETT

(DEC)...

RUTH L HENRICKS

(PET)...HARTNELL LAW GROUP

GENERAL INFORMATION

Continued from **01/04/16, 02/22/16, 04/05/16, 06/07/16, 08/16/16, 10/18/16, 12/19/16, 03/20/17, 06/12/17, and 08/21/17**

Continued **from 10/30/17**. If accounting not filed prior to next hearing the Court will suspend letters of administration, set OSC re: sanctions and notify the Public Administrator.

Continued from 01/08/18 at request of counsel to file status report. Counsel admonished re multiple continuance and non-filing of status report. Nothing new filed.

THIS CASE IS SET FOR HEARING ON **OSC re Sanctions/Removal of Administrator** on Accounting Review

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

1. Letters of Administration issued to Ruth Henricks on 03/16/07, full authority, no bond.
2. Seventh status report approved on 06/01/15.
3. Need accounting or next status report.

RECOMMENDATION

When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. § 11050 et seq. If continued, set on Thursday calendar as originally set.

(lc/dl/nb/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: TARA REILLY

DATE: 03/27/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS0600139

CASE NAME: IN RE ESTATE OF CHESTER RAY BURNETT

SEE ALSO 1

HEARING:

Accounting Review by ***

COUNSEL:

ALVILDA BUSH

(PET)...LENA GHIANNI

CHESTER RAY BURNETT

(DEC)...

RUTH L HENRICKS

(PET)...HARTNELL LAW GROUP

See matter #1.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 03/27/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1200518

CASE NAME: GEORGE H WILLIAMS

SEE ALSO 4, 16, 17

HEARING:

FIRST AND FINAL Account and Report of DACREY NORTHRUP and
Petition for allowance of fees filed.

COUNSEL:

ALICE JOHNSON	(PET)...ASHWORTH & ASHWORTH
DACREY NORTHRUP	(PET)...LAW OFFICE OF COTTLE & KEEN
DARINA WILLIAMS	(PET)...ROGERS & HARRIS
GEORGE H WILLIAMS	(DEC)...
MARGO RICHARDSON	(ERNEST L. HOWARD
MICHAEL HARRIS	(ROGERS & HARRIS
PAMELA ANN WILLIAMS CHUNCHICK	(PET)...PAUL D VELASCO
SKAIDRITE G WILLIAMS	(RES)...LAW OFFICES OF COTTLE & KEEN

GENERAL INFORMATION

Continued from **12/08/16, 03/16/17, 07/27/17, 10/12/17, 11/13/17 and 02/08/18 a request of counsel. Matter to be heard with motion for joinder.**

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees of DacreY Northrup Trustee.

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

1. **Need** notice of hearing and proof of service.
2. Creditor's Claim re Pamela Churchick for \$3,889,700.00 was rejected on 09/07/16. 90 days did not pass at time of filing of the accounting on 10/05/16. The period has now passed.
3. Petitioner, DacreY, alleges that there are ground leases subject to probate matter in Orange County and the subject of a court-approved settlement [Acct.10/05 LFpg4]. . Question why there are probate matters in both counties?
Supp 01/09/17: George lived in San Bernardino and Skaidrite lived in Huntington Beach around 1993/1994.
4. Petitioner disputes that the Orange County real property is or was a part of the decedent's estate.

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. There is not a proper balanced accounting with schedules. However, there was only a vehicle and boat valued at \$800. Accounting does not comply with Pr.C.§10900 and Pr.C.§1060 et. seq. JTD
6. There appears to be other pending matters in this case. Question how the estate can close? **Supp 01/09/17: Petitioner alleges as there are no assets, the estate may close.**
7. **Objections filed by Pamela Ann Williams Churchick on 12/01/16.**

RECOMMENDATION

Need proper notice; matter is contested. If approved, set hearing on the filing of receipts and final discharge for **04/04/19**.

(lc/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 03/27/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1200518

CASE NAME: GEORGE H WILLIAMS

SEE ALSO 3, 16, 17

HEARING:

Trial Setting Conference

COUNSEL:

ALICE JOHNSON	(PET)...ASHWORTH & ASHWORTH
DACREY NORTHRUP	(PET)...LAW OFFICE OF COTTLE & KEEN
DARINA WILLIAMS	(PET)...ROGERS & HARRIS
GEORGE H WILLIAMS	(DEC)...
MARGO RICHARDSON	(ERNEST L. HOWARD
MICHAEL HARRIS	(ROGERS & HARRIS
PAMELA ANN WILLIAMS CHUNCHICK	(PET)...PAUL D VELASCO
SKAIDRITE G WILLIAMS	(RES)...LAW OFFICES OF COTTLE & KEEN

No notes – TSC.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/27/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1300898

CASE NAME: Chia Hsin Huang

SEE ALSO 6, 7

HEARING:

Hearing Re: Amended first account & status report

COUNSEL:

ALEX HUANG	(PET)...LAW OFFICES OF YVONNE HS U
CHIA HSIN HUANG	(DEC)...
J DAVID HORSPOOL	(PET)...J. DAVID HORSPOOL

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON **AMENDED [12/26/17]** First Account Current and Status Report by Administrator, Alex Huang ["Petitioner"].

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

1. Amended Final Inventory and Appraisal affixed to supplement filed on 03/03/17 [LF, pgs. 12-15] is not filed. **Need** conformed copy of corrected Final Inventory and Appraisal.
2. Order Approving First Account entered on 04/13/17. **Need** Amended First Account Order.
3. Accounting period 06/04/13 to 05/06/15.
4. Assets on Hand \$985,387.67 consisting of real property and interests in several partnerships that own real property.
5. No compensation or fees are requested.
6. Petitioner requests reimbursements of costs totaling \$38,629.67. Itemized [LF, pgs. 7-8]. However, costs include postage fees that normally considered overhead. Does Court wish to reduce costs by \$116.74? **JTD**.
7. Other Liabilities – Schedule B [LF, p. 8] reflects "Estate Tax Returns" totaling \$20,000. Does Court wish to require invoices? **JTD**.
8. Petition indicates a creditor's claim in the amount of \$345,000 was allowed by Petitioner and approved by the court on 02/26/15. However, review of the register of actions and laser fiche do not reflect an allowance of same. **Need** conformed copy of Allowance of Creditor's Claim..
9. **Need** Assets on Hand at End of Account Schedule.

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. **Need** Notice of Hearing with proof of service.

RECOMMENDATION:

Need to clear notes. This accounting should be deemed in the nature of a status report. There is insufficient information and known defects that should preclude the Court from approving this accounting period. If approved, set next Accounting Review on first check calendar no sooner than **05/29/18**. Any account to be filed 30 days' before 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: 03/27/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1300898

CASE NAME: Chia Hsin Huang

SEE ALSO 5, 7

HEARING:

Hearing Re: Amended Second account & status report

COUNSEL:

ALEX HUANG

(PET)...LAW OFFICES OF YVONNE HS U

CHIA HSIN HUANG

(DEC)...

J DAVID HORSPOOL

(PET)...J. DAVID HORSPOOL

GENERAL INFORMATION:

Continued from **01/10/17** at request of counsel. Notice to be given by Ms. Park.
Continued from **03/14/17** at request of Court for recently filed supplement to be reviewed. Notice waived.

Continued from **05/16/17** at request of counsel. Notice to be given by Mr. Park
Continued from **07/18/17** at request of counsel. Notice to be given by Chun Kyong Park.

Continued from **09/05/17**. Court orders each accounting to be separate and distinct with orders requesting each accounting period. Petitioner's request for costs advanced is not allowed at this time. Court needs a corrected order for first Accounting.

Continued from **11/13/17** at request of counsel. The Court notes that until the Court is provided with an order on the 1st accounting the Court will not proceed on the 2nd accounting. Notice to be given by Ms. Park. Notice by Judicial Assistant.

Continued from 01/09/18. The Court needs the corrected Inventory and Order for the FIRST Accounting.

***** Court to rule on matter #5 prior to addressing this matter.*****

THIS CASE IS SET FOR HEARING ON **AMENDED (12/26/17)** Second Account and Petition for Fees by Administrator, Alex Huang ["Petitioner"].

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

1. First accounting approved on 10/15/15. Proposed Order Approving First Account affixed to supp. filed 07/12/17 [LF, p5] is not complete in and of itself.

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.

- Local Rule 20-614. **Need** proper order to include accounting period; balance; and description of the assets on hand. LR 20-614c.
2. Accounting period **05/07/15** to 05/31/16.
 3. Assets on Hand \$985,387.67 (carry value) consisting of real property and interests in several partnerships that own real property. However, beginning assets on hand do not match ending assets on hand of prior, first accounting period of \$1,522,462.36. **Supp. (07/12/17, LF, pgs. 6-11]** includes amended schedules for first accounting period (*that has previously been approved*) to reflect Assets on Hand at Beginning and End of Account period of \$985,387.67. JTD.
 4. Amended Final Inventory and Appraisal affixed to supplement filed 03/03/17 [LF, p. 12]. **Need** conformed copy of same.
 5. Statutory compensation will be requested at close of probate.
 6. Petitioner requests costs advanced of **\$12,374.00 for the second account** period when funds become available. Itemized [LF, pgs. 10-11]. However, costs include postage fees that normally considered overhead. Does Court wish to reduce costs by \$20.29? **JTD.**
 7. **Need** Summary of Account.
 8. **Expenses Incurred [LF, p. 9] reflects outstanding balance for estate tax returns in the amount of \$3,187.50. Does Court wish to require invoices? JTD.**
 9. **Need** Assets on Hand at End of Account period schedule.
 10. **Petitioner requests full authority under IAEA in order to facilitate the sale of the partnership asset, Mission Bell Ranch Development, A California Limited Partnership which is partially owned by the Estate and is in the process of negotiating the sale of a real estate owned by the partnership. If approved, need Notice of Proposed Action with proof of service. JTD.**
 11. Need Notice of Hearing with proof of service.
 12. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes. This accounting should be deemed in the nature of a status report. There is insufficient information and known defects that should preclude the Court from approving this accounting period. If approved, set next Accounting Review on first check calendar no sooner than **05/29/18**. Any account to be filed 30 days' before 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: 03/27/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1300898

CASE NAME: Chia Hsin Huang

SEE ALSO 5, 6

HEARING:

SECOND Account and Report of ALEX HUANG and Petition for allowance of fees filed.

COUNSEL:

ALEX HUANG

(PET)...LAW OFFICES OF YVONNE HS U

CHIA HSIN HUANG

(DEC)...

J DAVID HORSPOOL

(PET)...J. DAVID HORSPOOL

See prior matter #6.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 03/27/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500738

CASE NAME: MTR OF DORIS ANNE SUNDEEN

HEARING:

Hearing Re: PROBATE STATUS REPORT

COUNSEL:

DONALD HEMPSTEAD

(PET)...KATHRYN A FLANIGAN

DORIS ANNE SUNDEEN

(DEC)...

MARJORIE SUNDEEN HUMPSTEAD

(PET)...H. BROOKS TRAVIS

GENERAL INFORMATION:

Continued from 01/08/18 on Court's motion. Counsel H. Brooks Travis to file an accounting within 60 days from today. All parties are to cooperate. Nothing new filed.

THIS CASE IS SET FOR HEARING ON Status Report (filed 10/26/17) by Successor Administrator Donald Hempstead (nephew).

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

1. Letters of administration issued 09/14/15 to Marjorie Sundeen Hempstead as administrator, full authority, no bond. **Marjorie passed away on 06/02/16.** Successor Letters of administration issued to Donald Hempstead, nephew, 11/08/16, no bond.
2. Petitioner, Donald Hempstead, alleges the estate is not in a condition to be closed as he is unable to provide a successor administrator accounting without an account from the prior administrator. Petitioner files this report in efforts to marshal assets, and seek an order from this Court to compel H. Brooks Travis, attorney for previous administrator, provide an Account and Report for the period of time his client, was appointed administrator in accordance with Pr.C. §10953(b)(c)(d).
3. Petitioner requests the accounting review set for the Administration of Donald Hempstead be continued until attorney H. Brooks Travis' accounting for the Administration of Marjorie Sundeen Hempstead is approved.
4. Need final inventory and appraisal.
5. Notice of Hearing filed 10/27/17; however, need Notice of Hearing and proof of service in accord with Pr.C. § 12201. Whenever a status report is filed without an

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.**

accounting, notice must indicate a right to an accounting in accord with Pr.C. §10950.

6. **Response and Opposition to Request for Order compelling Attorney H. Brooks Travis to Account and Report filed 12/05/17.**
7. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 4-5. If approved, set next Accounting/Status Review for **01/07/19**.
(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: 03/27/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600508

CASE NAME: MTR OF RAMY A SALEH

HEARING:

Petition for final distribution on waiver of Account and Report
of JOANNA AVERETT and Petition for allowance of fees filed.

COUNSEL:

JOANNA AVERETT (PET)...BERNHARD A AAEN
RAMY A SALEH (DEC)...

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of
Account and for Fees by Administrator w/Will Annexed, Joanna Averett ["Petitioner"-
PPF].

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

1. Sole beneficiary/Successor Trustee waives accounting.
2. Assets on Hand \$1,196,997.54 consisting of \$363,400.54 in cash and remaining
in real and personal property.
3. Statutory fees of \$25,112.04 requested. Calculated.
4. Attorney requests extraordinary fees of \$8,993.50 for services rendered in
connection with the sale of real property. Billed at \$325/hour for a total of 27.70
hours' time. Itemized [LF, p. 9-11]. JTD.
5. Attorney does not request reimbursement for costs
6. Need address of beneficiary receiving real property.
7. Proposed Order 12/29/17 does not include address of beneficiary receiving real
property.

RECOMMENDATION

Court's discretion. If approved, set next hearing for final discharge on **04/02/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 03/27/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600819

CASE NAME: MTR OF ROSA HELEN ROBERTS

HEARING:

Accounting Review by ***

COUNSEL:

RHONDA MCDANIEL (PET)...RONALD W ASK

ROSA HELEN ROBERTS (DEC)...

GENERAL INFORMATION

Continued from 01/22/18 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 of Administration issued to Rhonda McDaniel, daughter, on 12/06/16; full authority, \$300,500 bond and \$350,000 to be placed into a blocked account. **Need** proof of blocked account.
2. Partial Inventory and Appraisal filed 11/05/17; Reappraisal filed 11/02/17. **Need final** inventory with supporting bank statements to support date of death balances per Local Rule 20-908.
3. **Need** accounting or status report.

RECOMMENDATION

Need to clear notes 1-3.

(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: 03/27/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600879

CASE NAME: MTR OF SHIRLEY ANN BIANCO

HEARING:

Accounting Review by ***

COUNSEL:

LISA D CARMONA	(PET)...PRO/PER
RHONDA A ANDERSON	(PET)...PRO/PER
SHIRLEY ANN BIANCO	(DEC)...

GENERAL INFORMATION:

Petition dismissed as to Rhonda Anderson only.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued to daughter, Lisa D. Carmona on 01/17/17, full authority, \$25,000 bond.
2. No accounting or status report. 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: TARA REILLY

DATE: 03/27/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700958

CASE NAME: MTR OF AARON BRODAHL

HEARING:

Spousal Property Petition hearing.

COUNSEL:

AARON BRODAHL

(DEC)...

CRESTIN AARA

(PET)...PRO/PER

MINOR CHILDREN

(MIN)...PRO/PER

GENERAL INFORMATION:

Continued from 01/22/18 on Court's motion. The Court orders supplement be filed correcting petitioner's name to be Crestin Brodahl. The Court appoints Sherri Kastilahn as guardian ad litem for the minor children. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Crestin Ara

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

1. Petitioner, Crestin Aara, seeks court to determine and confirm her half of community property and determine that decedent's half transfer to petitioner without administration.
2. **Need** report by GAL, Sherri Kastilahn.
3. **Need** Notice of Hearing with proof of service to decedent's issue(s).
4. ~Proposed Form Order: 03/07/18

RECOMMENDATION:

Need to clear notes 2-3, then Court's discretion. If approved, set on Monday calendar as originally set.

(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: 03/27/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701259

CASE NAME: Kathleen Gebbia

HEARING:

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

COUNSEL:

JULIE LINDENBERG (PET)...SHEASBY AND ASSOCIATES

KATHLEEN GEBBIA (DEC)...

GENERAL INFORMATION

Ex Parte orders granted 02/26/18. Special Administrator is authorized to marshal assets to bring real estate current and to collect any motor vehicles not in the possession of the trust.

Continued from 01/22/18 at request of counsel.

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

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

1. All heirs waive bond. Net estate value consists of \$30,000. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code §8481(b))
2. **Proof of publication is not published on an adjudicated newspaper. Need proper publication.**
3. ~Proposed Form Order: 12/15/17

RECOMMENDATION

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

(cs/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 03/27/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800149

CASE NAME: LOUISE CELESTE MYERS AKA LOUISE C. MYERS ETC

HEARING:

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

COUNSEL:

LOUISE CELESTE MYERS (DEC)...
RALPH D. MYERS (PET)...THOMAS W DOMINICK

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by spouse, Ralph D. Myers ["Petitioner"].

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

1. Will waives bond. Estimated estate valued at \$400,000. 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. ~Proposed Form Order/Letters 02/16/18

RECOMMENDATION:

Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **06/04/19**. 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: 03/27/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800158

CASE NAME: MTR OF IMA JEAN DICKERSON

HEARING:

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

COUNSEL:

GLEN FREDRICK DAVIS (PET)...PRO/PER
IMA JEAN DICKERSON (DEC)...

GENERAL INFORMATION:

Ex Parte orders granted 02/27/17, limited authority. Special administrator is granted authority to access bank/investment accounts and marshal assets for the sole purpose of working with the mortgage holder in stopping foreclosure of real property and bringing mortgage current.

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

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

1. All heirs waive bond. Estimated estate valued at -\$135,405.41. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
2. Need proof of publication.
3. ~Proposed Form Order/Letters 02/20/18.

RECOMMENDATION:

Need to clear note 2 then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **06/04/19**. 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: 03/27/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1200518

CASE NAME: GEORGE H WILLIAMS

SEE ALSO 3, 4, 17

HEARING:

Hearing Re: PETITION TO ENFORCE JUDGMENT

COUNSEL:

ALICE JOHNSON	(PET)...ASHWORTH & ASHWORTH
DACREY NORTHRUP	(PET)...LAW OFFICE OF COTTLE & KEEN
DARINA WILLIAMS	(PET)...ROGERS & HARRIS
GEORGE H WILLIAMS	(DEC)...
MARGO RICHARDSON	(ERNEST L. HOWARD
MICHAEL HARRIS	(ROGERS & HARRIS
PAMELA ANN WILLIAMS CHUNCHICK	(PET)...PAUL D VELASCO
SKAIDRITE G WILLIAMS	(RES)...LAW OFFICES OF COTTLE & KEEN

GENERAL INFORMATION

Continued from 06/23/16 and 09/01/16. Counsel to respond within 20 days.

Continued from **11/09/16, 12/08/16, 03/16/17 and 07/26/17**. Any further objection to be filed by 04/15/17.

Continued from 10/12/17, 11/13/17 and 02/08/18 at request of counsel, to be heard with motion of joinder.

THIS CASE IS SET FOR HEARING ON Petition to Enforce Judgment

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

1. Petitioner, Pamela Ann Williams Churchick, alleges that she is the executor of the Estate of Rita Williams and the successor trustee of the Rita Williams Living Trust.
2. Petitioner alleges that Rita Williams and Alice Johnson were awarded damages in a money judgment that was entered in 7/2/08 against George Williams.
3. On or about July 30, 2008, George Williams allegedly fraudulently transferred real property located at 16651 Bolero Lane, Huntington Beach, CA (Bolero Property) to his wife, Skaidrite Williams. Skaidrite has allegedly died.

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. George filed an appeal of the Judgment on August 28, 2008. The trial court's ruling was affirmed.
5. Rita died on 4/12/11. The beneficiary of her estate is the Rita Williams Living Trust.
6. George died on 9/8/11. Petitioner filed a creditor's claim against George's estate for the full amount of the judgment on September 7, 2012.
7. Petitioner seeks an order conveying the Bolero Property. She also seeks the imposition of a constructive trust. She also seeks to quiet title to the 16651 Bolero Lane, Huntington Beach, CA and double damages under Pr. C. 859.
8. **On 5/20/16, Objector Darina (Sky) Williams filed a demurrer, wherein she argues that the court lacks jurisdiction and the claims are barred by the applicable statute of limitations.**
9. **On 5/23/16, Dacrey Northrup, Trustee of the Williams Family Trust as filed a demurrer to the petition, alleging that each of the causes of action are barred under the applicable statute of limitations and/or the doctrine of latches. Dacrey also argues that the court has no jurisdiction over the Bolero Property.**
10. **Objection to Demurrer of Dacrey Northrup filed by Pamela Churchick on 06/10/16.**
11. **Further objection filed by Dacrey Northrup on 09/16/16.**
12. **Answer filed by Darina Sky Williams on 07/18/17.**
13. **Objection filed by Margo Richardson, PPC on 07/21/17.**
14. **Notice of pendency of action filed by Pamela Ann Williams Churchick on 02/22/17.**

RECOMMENDATION:

Treat the demurrers as objections and set for evidentiary hearing.
(occ/lc/nb).

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 03/27/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1200518

CASE NAME: GEORGE H WILLIAMS

SEE ALSO 3, 4, 16

HEARING:

Motion Re: Order compelling joinder of Alice Johnson; Memorandum of Points and Auth Filed by Petitioner DACREY NORTHRUP

COUNSEL:

ALICE JOHNSON	(PET)...ASHWORTH & ASHWORTH
DACREY NORTHRUP	(PET)...LAW OFFICE OF COTTLE & KEEN
DARINA WILLIAMS	(PET)...ROGERS & HARRIS
GEORGE H WILLIAMS	(DEC)...
MARGO RICHARDSON	(ERNEST L. HOWARD
MICHAEL HARRIS	(ROGERS & HARRIS
PAMELA ANN WILLIAMS CHUNCHICK	(PET)...PAUL D VELASCO
SKAIDRITE G WILLIAMS	(RES)...LAW OFFICES OF COTTLE & KEEN

Currently under review by Legal Research.

(LR)

Future Hearing:

05/08/18 Motion to enforce subpoenas served etc.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **CONSERVATORSHIP**

DATE: 03/27/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS0800148

CASE NAME: DEBORAH LYNNE PICKETT

HEARING:

FINAL (13TH) Account and Report of FRANK D. PICKETT III, DALE NOEL and Petition for allowance of fees filed.

COUNSEL:

DALE NOEL	(CPE)...LINDA M BATTRAM
DEBORAH LYNNE PICKETT	(CEP)...
FRANK D PICKET III	(CPE)...LINDA M BATTRAM

GENERAL INFORMATION

Conservatee passed away on 01/20/17.

Continued from **07/24/17** at request of counsel. Notice given by Ms. Battram.

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

Continued from 01/22/18 on Court's motion. Counsel report conservatee passed away on 01/08/18. Sherri Kastilahn is relieved as counsel for conservatee.

THIS CASE SET FOR HEARING ON **Amended (01/18/18)** Thirteenth and Final Account and Request for Termination of Conservatorship and Exoneration of Bond by Co-Conservators, Dale Noel and Frank D. Pickett III ["Petitioners"].

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

1. Accounting period: 07/01/16 to 01/20/17 & 01/21/17 to 03/30/17 (pre & post death).
2. Assets on hand: \$6,800.00 consisting of personal property.
3. Pre & Post-Death Accounts do not include a Non-Cash Assets on Hand at End of Account Period **Schedules or descriptions of property. Need** verified supplement.
4. Co-Conservator/petitioner, Frank D. Pickett, does not seek reimbursement due to lack of funds.
5. Attorney does not request fees due to lack of funds.
6. Petitioners request current bond of \$100,000 to be exonerated. However, bond is not exonerated until entry of final discharge order.

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. Co-Conservators/Petitioners request to be relieved of their duties under the Conservatorship and termination of the Conservatorship. Conservatorship of the Person terminated by operation of law upon Conservatee's demise and the Court retains jurisdiction of the estate.
8. Petitioner, Frank D. Pickett, III, requests distribution of personal property (the family heirloom furniture) to himself via Pr. C. § 13100 (affixed to inventory filed on 06/19/17- LF, p. 8). JTD.
9. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear note 3 then Court's discretion. If approved, set next hearing for final discharge for **04/02/19**.

(nb/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: 03/27/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1300047

CASE NAME: ALAN S. GILHAM

HEARING:

Third Account and Report of INLAND COUNTIES REGIONAL CENTER,
INC. and Petition for allowance of fees filed.

COUNSEL:

ALAN S GILHAM

(CEP)...

INLAND COUNTIES REGIONAL CENTE

(CE)...LAYNE A BARTHOLOMEW

GENERAL INFORMATION:

Continued from 01/16/18 on courts motion.

THIS CASE IS SET FOR HEARING ON Third Account Current and Report of SNT and
Petition for Approval of Trustee's Fees and Attorney's Fees by Trustee, IRC
["Petitioner"].

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

1. Accounting covers 09/01/15 to 08/31/17.
2. Assets on hand: \$38,849.59 in cash held in a pooled investment fund.
3. Current bond of \$78,000. Petitioner requests bond be decreased to \$43,000.
Appears sufficient. JTD.
4. Petitioner requests approval and ratification of trustee fees already taken by
Master Trust of California in the amount of \$1,844.87. Billed at \$1,000 for the
first \$50,000; 2% of the next \$250,000; 1.65% of the next \$450,000 and 1.50%
of the next \$250,000.
5. Petitioner requests authority to allow Master Trust to continue taking its annual
fee in quarterly payments according to its fee schedule dated 06/13/17 [LF, p.
60]. JTD
6. Attorney Bartholomew requests fees of \$805. Billed at the rate of \$250/hour for
1.5 hours' attorney time and \$100/hour for 4.3 hours' paralegal time. Itemized
[LF, p. 51].
7. Petitioner requests authority to amend the trust to add Medicaid Language
provisions as a new Article Nine of the trust. JTD.
8. Due to the low value of this trust, petitioner requests that the court order biennial
accountings. 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.**

9. ~Proposed Order 11/29/17.

RECOMMENDATION

Court's discretion re bond and trust amendment. If approved, set hearing on the next Accounting Review for or **10/30/18** (if one year) or biennial for **10/29/19** (if two years). 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: 03/27/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400267

CASE NAME: DAVID L HEISS

HEARING:

Second and final Account and Report of KAY M ADAMS and Petition
for allowance of fees filed.

COUNSEL:

DAVID L HEISS	(CTE)...
JENNIFER H HEISS	(PET)...JENNIFER DANIEL
KAY M ADAMS	(CPE)...JENNIFER M DANIEL

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Second and Final Account by Former
Conservator, Kay Adams ["Petitioner"] and Petition for Fees.

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

1. Accounting period 07/01/16 to 10/17/17.
2. Assets on Hand \$214,325.62 consisting of \$19,725.62 in cash and remaining in real and personal property.
3. Property on Hand at Beginning of Account Period does not reflect amount at End of Prior Account Period as reflected in Judgment on First Account entered on 05/24/17. **Need** amended Summary of Account and affected schedules.
4. Petitioner does not request compensation or reimbursement.
5. Attorney requests fees of \$10,567.50. Billed at the reduced rate of \$275/hour for 20.7 hours' attorney time and \$125/hour for 39 hours' paralegal time and costs. Itemized [LF, pgs. 34-45]. **JTD**.
6. Disbursements, Schedule C [LF, p29] indicates the Arrvest Bank Account was closed and it was unable to be determined where the balance was deposited or if funds were spent down for a total of \$382.88. Does Court wish to deem amount de minimus? **JTD**.
7. Petitioner has paid Life Saving Angels Caregiving for caregiver services during this accounting period. **Need** verified declarations to verify dates of service, performance of services and that payment has been received per Local Rule 20-1406(c).

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.**

8. Conservatee now resides in Claremont, CA, in Los Angeles County. Suggest transfer to LA County. **JTD**. If so, Court to set control date.
9. Proposed Order 02/20/18 exonerated bond and discharges petitioner upon filing of receipts instead of upon entry of a final discharge order.

RECOMMENDATION:

Need to clear notes 3 & 7 then Court's discretion. If approved, set next hearing for receipts and final discharge for **04/02/19**.

(nb)

Future Hearing:

04/11/18 Petition for appointment of successor conservator

04/11/18 Accounting Review.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 03/27/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700009

CASE NAME: JOAN JACKSON

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of DONALD BEASLEY

COUNSEL:

DONALD BEASLEY

(PET)...PRO/PER

JOAN JACKSON

(CEE)...CRAIG M PARKER

GENERAL INFORMATION

**Continued from 01/22/18. Counsel reports conservatee passed away on
12/24/17. Notice of death filed.**

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Donald Beasley, appointed conservator of the person only on 07/17/17.
2. Determination of Conservatee's Appropriate Level of Care filed 10/05/17.
3. Care Plan in accord with Pr.C.§2352.5 filed 10/05/17.
4. Notice of Conservatee's rights per Pr.C.§1830(c) filed 10/05/17.

RECOMMENDATION:

None.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 03/27/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700167

CASE NAME: MICHELLE PEREZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ROSA SANTOYO LOPEZ

COUNSEL:

MICHELLE PEREZ	(CTP)...CANDICE A. GARCIA-RODRIGO
ROSA SANTOYO LOPEZ	(PET)...PRO/PER
YESSICA CALDERA	(PET)...PRO/PER

GENERAL INFORMATION

Continued from 01/22/18 on Court's motion. Counsel reports she will assist petitioners in clearing probate notes.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Rosa Santoyo and Yessica Caldera appointed limited conservators of the person on 06/19/17.
2. Notification of Conservatee's Rights per Pr.C. §1830(c) filed 02/05/18; however, Sections 6-8 are incomplete as to father and paternal grandparents addresses. JTD.
3. Determination of Conservatee's Appropriate Level of Care filed.
4. Care Plan filed.

RECOMMENDATION

Judge to decide re note 2.

(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: 03/27/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700178

CASE NAME: MTR OF CONNIE ORTIZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ROSALIE R MENDIETA

COUNSEL:

CONNIE ORTIZ (CEP)...E JOAN NELMS
ROSALIE R MENDIETA (CPE)...ELISABETH KEMPE-OLINGER

XREF: SCSS02088 (Jessie R Ortiz)

GENERAL INFORMATION

Rosalie R. Mendieta (sister) appointed Conservator of the Person and Estate on
08/22/17, \$126,555.00 bond.

THIS CASE IS SET FOR HEARING ON Inventory & Appraisal/Compliance Review

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

1. Notification of Conservatee's Rights filed.
2. Care Plan filed.
3. Conservatee's Appropriate Level of Care filed.
4. Final Inventory & Appraisal filed.
5. Notice of Filing of Inventory & Appraisal including Instructions for Objection filed.
6. Proof of recordation of letters filed.

RECOMMENDATION:

None.

(nb)

Future Hearing:

10/30/18 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: TARA REILLY

DATE: 03/27/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700270

CASE NAME: MTR OF LINA LORRAINE OTERO

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of LINA S GARCIA

COUNSEL:

LINA LORRAINE OTERO	(CTP)...JAMES B CHURCH
LINA S GARCIA	(CP)...PRO/PER
VANESSA S GONZALES	(CP)...PRO/PER

GENERAL INFORMATION

Lina S. Garcia and Vanessa S. Gonzales appointed Co-Conservators of the person on 10/10/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Need proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's Rights per Pr.C.§1830(c).
2. Need Statement of Care Plan in accord with Pr.C.§2352.5.
3. Need a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 03/27/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700349

CASE NAME: ROBERT IRA LARKIN

SEE ALSO 26

HEARING:

Petition for appointment for conservatorship for person & estate

COUNSEL:

JUANITA LANDRY

(PET)...PRO/PER

ROBERT IRA LARKIN

(CEE)...EDWARD B FISCHEL

GENERAL INFORMATION

Ex parte orders denied 09/28/17. Court notes proposed conservatee has no objection to conservatorship.

Continued from **10/30/17** Court waived return of citation as Robert Larkin is present in court. Attorney Edward B. Fischel is appointed for Robert Larkin

Continued from 01/22/18 on courts motion. Juanita Landry withdraws her request to withdraw her petition for conservatorship. She will attempt to get a bond.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by **Juanita Landry**, friend

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

1. Petitioner requests no bond. However, estate assets consisting of \$2,000 in personal property and unknown monthly income received from an unnamed trust account of which proposed conservatee is a beneficiary.
 - a. Need verified supplement clarifying trust information, including trustee and income received; also need clarification re Veteran's income.
 - b. Does Court wish to require a copy of trust? JTD
2. Petitioner does not request medical powers in item #1g, yet indicates medical treatment in item #9. Need verified supplement clarifying requested powers. If medical powers sought, need Capacity Declaration.
3. Petition is incomplete as follows:
 - a. Item #9d as to whether proposed conservatee is an adherent of religion relying on prayer for healing. 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.**

- b. Item #11 indicates no known relatives. However, Attachment 3f(1) alleges petitioner contacted relatives. Need verified supplement clarifying known relatives' information.
4. Need notice of hearing and proof of service to relatives described in Attachment 3f(1) of petition, public guardian, trustee, and Veteran's Administration.
5. Conservatee present at 10/30/17 hearing. Court waives return of citation.
6. CI report filed 10/13/17.
7. Certificate of Completion of the Conservatorship Training Class filed.
- 8. Report of court appointed counsel, Edward B Fischel, filed.**
9. ~Proposed Form Order: 09/21/17.

RECOMMENDATION

Need to clear notes 1-4. If approved, set hearing for Compliance Review for **10/31/18** for the filing of the required documents and hearing re Accounting Review for **06/05/19**. Any accounting to be filed 30 days in advance.

(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: 03/27/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700349

CASE NAME: ROBERT IRA LARKIN

SEE ALSO 25

HEARING:

Petition for Appointment of Conservator

COUNSEL:

JUANITA LANDRY

(PET)...PRO/PER

ROBERT IRA LARKIN

(CEE)...EDWARD B FISCHER

GENERAL INFORMATION

Continued from 01/22/18 on courts motion.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by proposed conservatee, Robert Larkin, appointing Verlene Cameron, **PPF**.

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

1. Proposed Conservator, Verlene Cameron, is a nominee of Conservatee.
2. Petitioner seeks bond of \$50,000. Estimated estate value consists of \$2,000 personal property and \$33,000 income from mother's trust.
 - a. Need verified supplement clarifying Veteran's income.
 - b. Does Court wish to require a copy of trust? JTD
3. Petition is incomplete as follows:
 - a. Sections 1(d)-1(l) do not request any powers. Need clarification re powers requested.
 - b. Section 5(c) as to why conservatorship required. Need verified supplement.
 - c. Item #9d as to whether proposed conservatee is an adherent of religion relying on prayer for healing. Need verified supplement.
4. Section 5 of Conservator Screening form is unclear. Need verified supplement.
5. Need notice of hearing and proof of service.
6. Need list of required contacts (Local form SB-12224).
7. Need Certificate of Completion of the Conservatorship Training Class.
8. Need Court Investigator report.
9. ~Proposed Form Order: 12/22/17

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 2-8. If approved, set hearing for Compliance Review for **10/31/18** for the filing of the required documents and hearing re Accounting Review for **06/05/19**. Any accounting to be filed 30 days in advance.

(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: TARA REILLY

DATE: 03/27/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700448

CASE NAME: CALVIN DAMON FORD

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CALVIN DAMON FORD	(CEP)...MITCHELL I ROTH
GIORDON P FORD	(CE)...
MAXINE E FORD	(CP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Mother, Maxine E. Ford, appointed temporary conservatorship of the person on 12/13/17; brother, Giordon P. Ford appointed temporary conservator of the estate on 12/13/17, \$20,000 bond. Amended order entered 12/15/17. Court appoints Mitchell I Roth as GAL. Temporary conservator(s) are ordered to have conservatee medically evaluated at Reche Canyon Rehabilitation Center today. Notice by Judicial Assistant. **Continued from 01/16/18. GAL's report filed in the courtroom. Return of citation waived. Temporary conservators are ordered to return conservatee's wallet to him. All parties are ordered to meet and confer to discuss medical and business issues and to choose a doctor that will conduct a medical evaluation.**

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by mother, Maxine E. Ford and son, Giordon P. Ford ["Petitioners"].

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

1. Current temporary bond in the amount of \$20,000 fixed. However, estimated value of the estate is 'unknown.' JTD.
2. Petitioner seeks medical powers. **Capacity Declaration filed on 03/20/18 has the following deficiencies:**
 - a. Section 2 does not include physician's phone number;
 - b. Section 8 indicates 4 pages are attached. However, there are not attachments.**Need complete capacity declaration.**
3. Report by GAL, Mitchell I Roth filed.
4. Court Investigator's Report 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.**

5. **Need** Duties of Conservator and Acknowledgment of Receipt of Handbook form.
6. **Need** Notification to Court Address of Conservatorship form.
7. Court to review Conservatorship Screening Form by Maxine. Also, section 18 is incomplete. **Need** verified supplement.
8. Section 18 to Conservatorship Screening Form by Giordon is incomplete. **Need** verified supplement.
9. Notice of Hearing filed on 02/22/18 does not include Veteran's Administration. **Need** proper service.
10. Certificates of Completion re: Conservatorship Class filed.
11. Court-ordered evaluation filed 12/14/17.
12. Petitioner requests an Order authorizing the general Conservator of the Estate the authority to operate the business known as "Sabbath R. Trucking."
13. No proposed order/letters. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 2, 5-9 then Court's discretion re: bond. If approved, set hearing for Compliance Review for **10/30/18** 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; and recordation of letters if applicable per Pr.C.§2313.

Set hearing re: Accounting Review for **06/04/19**. 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: 03/27/18 TIME: 9:30 DEPT: S37P

CASE#: RC RS00546

CASE NAME: HELEN C BOYLES

HEARING:

Accounting Review by ***

COUNSEL:

CAROLANN R STONEY (PET)...ALLAR, SHELTON & O'CONNOR
CELIA D MCDONALD (PET)...ALLAR, SHELTON & O'CONNOR
HELEN C BOYLES (PCE)...

CCP170.6 filed as to CYNTHIA LUDVIGSEN

XREF: RPRRS02845 (Helen C Boyles)

GENERAL INFORMATION:

On 6/20/06, Court was informed conservatee died on 11/9/05

Continued many times since 9/12/06 with no appearances on: 5/8/12, 6/12/12, 7/24/12, 8/28/12, 12/4/12, 4/30/13, 12/10/13 and 3/18/15.

On 4/29/15 Court set this OSC hearing as there was no appearance or I&A or accounting/status report filed. Attorney Keith Walker is ordered to personally appear. Continued from 08/06/15. No appearance. Citation reissued to Keith Walker. Continued from 10/08/15 and 01/12/16. Counsel cannot locate his clients. Counsel to file a motion to be relieved or file an accounting. Attorney Keith Walker ordered to appear.

Continued from 03/22/16. No appearances. Attorney Keith Walker ordered to appear. Continued from 05/10/16, 06/30/16 and 09/26/16. No appearances. Petitioners and counsel are cited to appear at next hearing. Citation issued to: Carolann Stoney; Celia McDonald; and Keith Walker.

Continued from 12/19/16. Counsel ordered to file either a waiver of accounting, or an accounting, and will continue the matter to allow for that filing. Former conservators Carolann R Stoney and Celia D Mc Donald are suspended. Court orders counsel to file a fee waiver on behalf of suspended conservators with waiver of account/accounting.

Continued from 04/03/17 on Courts motion for accounting/status report to be filed. Petitioner urged to speak with counsel to assist with accounting/status report.

Accounting/status report to be filed 30 days prior to next hearing.

Continued from 06/26/17. Patrick Wright appointed as referee.

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.

Continued from **09/18/17** at request of petitioner to clear probate notes/filing of accounting.

Continued from 01/22/18 for Judge Reilly to hear.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Carolann Stoney & Celia McDonald, daughters, appointed as co conservators of the person and estate on 07/26/05, no bond. **Conservatee died 11/9/05.**
2. The related probate matter RPRRS02845 shows that Letters of Special Administration were granted on 2/14/05 (and appear from the file they are still in effect). The petition for General Letters of Administration and the Petition to Determine Title to Real Property located at 8181 Salina Street, Rancho Cucamonga, CA, per Pr.C. 850 were taken off calendar on 6/12/12 for failure to appear and prosecute.
3. Final inventory **filed 01/05/18** has the following deficiencies:
 - a. Statement about the Bond section is incomplete; not dated or signed.
 - b. Includes jointly owned personal and real property.
Need corrected inventory and appraisal.
4. **Need** 1st accounting including pre and post death balances per Pr. C. §2620.

RECOMMENDATION:

Need to clear notes 3 and 4. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(kra/abs/abs/nmt/cbr/kra/hfl/vet/gls/vet/gls/cbr/vet/cbr/vet/cbr/vet/cbr/gls/kra/cbr//nb/lc/nb/ww/cs/nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 03/27/18 TIME: 9:30 DEPT: S37P

CASE#: RC RS659

CASE NAME: IN THE MTTR OF DAVID J OMLIN

HEARING:

THIRD CURRENT Account and Report of KATHERINE BRIGGS, KARIN LANGWASSER and Petition for allowance of fees filed.

COUNSEL:

DAVID JOSEPH OMLIN	(CEP)...PRO/PER
DAVID JOSEPH OMLIN	(PCE)...
ELSIE L OMLIN	(PET)...ALLAR, SHELTON & O'CONNOR
KARIN LANGWASSER	(CPE)...BRIGGS LAW CORPORATION
WELLS FARGO BANK, N.A.	(CE)...MARK L SAMSON
WELLS FARGO BANK, N.A.	(PET)...MARK L SAMSON

XREF: PROPS1200657 (Anton Omlin Testamentary Trust)

Continued from **2/18/15** at request of counsel.

Continued from **4/15/15** for review of supplement filed this date.

Continued from **03/13/17, 06/05/17 and 08/14/17**. The Court orders supplement filed as to Karen Langwasser's fees and her assertion that she has been hired as a paid professional in this matter. The Court orders a copy of the contract hiring her be filed with the court. The Court finds Karen Langwasser's request for fees to be unreasonable and is consider removing conservators and surcharging them. The Court does not approve attorney fees or conservator bills. The Court will approve professional rate of reimbursement as to tax return preparation only. The Court orders supplements to be filed.

Continued from 10/30/17. After oral report by Mr. Briggs the Court continues matter to review declaration/supplements filed in July and August 2015 addressing the issues raised by the Court. Supplement to be filed addressing \$800/monthly allowance with receipts where possible.

THIS CASE IS SET FOR HEARING ON Second Account Current and Report of Successor Co-Conservators, Katherine Briggs and Karin Langwasser; Request for Conservators' Fees and for Attorney's Fees

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

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

1. Accounting covers 12/05/14 to 12/31/16.
2. Assets on hand: \$178,090.96 of which \$9,382.96 is cash and the balance in securities.
3. Petitioners request fees of \$18,525 for services rendered during this account period through 01/10/17. It is unclear if petitioner is requesting fees or requesting to pay a CPA. **Supp. (06/02/17) indicates petitioner is requesting to pay for CPA services and affixes invoice [LF, pgs. 9-37]. JTD.**
4. Petitioner requests attorney fees and costs of **\$2,972.50**. Billed at \$225/hour for attorney time. Itemized [see supp. filed 06/02/17, LF, pgs. 51-55].
5. Liabilities at End of Account Period – Schedule G [LF, p. 25] reflects a total of \$18,525 to petitioner's CPA. Invoices by petitioner's CPA affixed [pgs. 527-557]. Billed in varying rates of \$125-\$225 totaling \$18,525.00. These fees appear excessive based on the size of the estate. Question why the substantial fees on preparing an annual accounting and \$225/hour for preparing checks to pay bills; or the need for a CPA? **Supp. (06/02/17) affixes declaration of Karen Langwasser [LF, p. 6], co-conservator and CPA, indicates she took over the accounting and tax services, along with managing Conservatee's personal and medical care, Conservatee's 96-year old mother is no longer able to manage his care.**
6. Distributions to Conservatee or Ward – Schedule K [LF, pgs. 19-20] reflects a monthly allowance to Elsie Omlin in the amount of \$800/month for providing clothing, transportation, music, supplies and other expenses for the benefit of Conservatee, David Omlin. Does Court wish to ratify monthly allowance? JTD.
7. Declaration filed 07/27/15 Co-Conservator, Karin Langwasser, CPA. Karin states that the managing of the assets includes tax services, processing multiple monthly disbursements for housing, medical and legal expenses, etc.
8. **Declaration filed 01/05/18 by Co-Conservator, Karin Langwasser, CPA, includes a summary of reimbursement of expenses with receipts but includes mileage [LF, pgs. 46-47] which is normally considered overhead. JTD.**
9. Proposed Order 01/17/17 does not include assets on hand at end of account period; reflects incorrect account period and hearing date; and purports to pay Conservator's fees directly to CPA.

RECOMMENDATION

Court's discretion re: fees. If approved, set next Accounting Review for **06/05/18** (if one year) or **2/26/19** (if two year). Account to be filed 30 in advance of hearing. Note requirements of Local Rules.

(nb/cs/nb)

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

DATE: 03/27/18 TIME: 9:30 DEPT: S37P

CASE#: SC SS02219

CASE NAME: MATTER OF MARIAN DRAYMAN

HEARING:

Accounting Review by ***

COUNSEL:

BARBARA DRAYMAN	(PRO/PER
CARYN VELASCO	(OBJ)...PRO/PER
LINDA JOHNSON	(CP)...C.L. FARRELL
LINDA JOHNSON	(CPE)...C.L. FARRELL
MARIAN DRAYMAN	(CEP)...ROBERT C CHANDLER

GENERAL INFORMATION

Continued from **03/27/17**. No appearances. Linda Johnson and/or counsel are ordered to be present if accounting not filed.

Continued from **06/26/17**. Another asset found/accounting to be filed.

Continued from **09/18/17** continued at request of counsel due to newly discovered asset/file accounting. Notice to be given by Mr. Farrell

Continued from 01/22/18 on courts motion. Counsel reports there is an unclaimed asset she is waiting for prior to filing accounting. The Court requests accounting be filed prior to the claiming of the unclaimed asset.

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

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

1. Ex Parte Petition to Dispense with Accounting and Order entered 04/08/15.
2. Need trust accounting or waiver of accounting beginning with 03/01/15.
3. Need notice of continuance.

RECOMMENDATION:

Need notice. When the trustee fails to file an accounting as ordered, the court may take action as specified in Pr.C. § 800 and C.C.P. § 128.

(nb/ww/cs/nb)

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

DATE: 03/27/18 TIME: 9:30 DEPT: S37P

CASE#: VC VS00251

CASE NAME: MTR OF LORENA SARAI BENITEZ

SEE ALSO 32

HEARING:

Hearing Re: PTN FOR MI'S COMP/SPL NEEDS TRUST/BANK FEE

COUNSEL:

ANGEL L BENITEZ	(PET)...BEATRICE L LAWSON
BERTHA A BENITEZ	(PET)...BEATRICE L LAWSON
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
GWENDOLYN BENITEZ	(MIN)...CALDWELL, KENNEDY & PORTER,
GWENDOLYN BENITEZ IRREVOCABLE	(TRU)...PRO/PER
JEANNE KENNEDY	(PET)...JEANNE E KENNEDY
LORENA SARAI BENITEZ	(CEP)...DONNASUE ORTIZ
LORENA SARAI BENITEZ	(CEP)...PRO/PER
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ROBERT BENITEZ IRREVOCABLE TRU	(TRU)...PRO/PER
ROBERT BENITEZ JR	(OBJ)...STANLEY W HODGE
ROBERT C. BENITEZ	(PET)...PRO/PER
ROBERT C. BENITEZ JR	(SC)...PRO/PER
ROBERTA L TAYLOR	(PET)...ROBERTA L TAYLOR
ROBERTO CARLOS BENITEZ	(CPE)...PRO/PER
VIOLETA TOPETE	(CPE)...PATRICIA A LOBELLO
VIOLETA TOPETE	(PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by ROBERT C. BENITEZ JR is GRANTED

Currently under review by Legal Research.
(LR)

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: TARA REILLY

DATE: 03/27/18 TIME: 9:30 DEPT: S37P

CASE#: VC VS00251

CASE NAME: MTR OF LORENA SARAI BENITEZ

SEE ALSO 31

HEARING:

Petition for to Approve Compromise of Disputed claim, Compromise
of Pending Action, Person with Disabili

COUNSEL:

ANGEL L BENITEZ	(PET)...BEATRICE L LAWSON
BERTHA A BENITEZ	(PET)...BEATRICE L LAWSON
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
GWENDOLYN BENITEZ	(MIN)...CALDWELL, KENNEDY & PORTER,
GWENDOLYN BENITEZ IRREVOCABLE TRU	(TRU)...PRO/PER
JEANNE KENNEDY	(PET)...JEANNE E KENNEDY
LORENA SARAI BENITEZ	(CEP)...DONNASUE ORTIZ
LORENA SARAI BENITEZ	(CEP)...PRO/PER
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ROBERT BENITEZ IRREVOCABLE TRU	(TRU)...PRO/PER
ROBERT BENITEZ JR	(OBJ)...STANLEY W HODGE
ROBERT C. BENITEZ	(PET)...PRO/PER
ROBERT C. BENITEZ JR	(SC)...PRO/PER
ROBERTA L TAYLOR	(PET)...ROBERTA L TAYLOR
ROBERTO CARLOS BENITEZ	(CPE)...PRO/PER
VIOLETA TOPETE	(CPE)...PATRICIA A LOBELLO
VIOLETA TOPETE	(PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by ROBERT C. BENITEZ JR is GRANTED

Currently under review by Legal Research.
(LR)

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.**