



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 04/03/18

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.

nb0319/0328

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PROBATE

DATE: 04/03/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500282

CASE NAME: Mizuka Michy Hockett

HEARING:

Hearing re Final Discharge

COUNSEL:

BILLY STIREWALT

(PET)...JOELLE LEE A. NICHOL

MIZUKA MICHY HOCKETT

(DEC)...

GENERAL INFORMATION:

Continued from 10/03/17 and 02/06/18 at request of counsel. Court notes it will accept declaration re check in lieu of receipt.

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Settling First and Final Accounting entered 09/27/16.
2. Need receipt by Susan M. Hockett (Barela) for \$100.00. **Supp. (03/21/18) indicates as of this date, the check has not been cashed and no "Receipt" has been returned. Petitioner requests the Court authorize petitioner to turn the \$100 over to San Bernardino County as unclaimed funds. JTD.**
3. **Supp. (03/21/18) indicates the Estate is due a tax refund of about \$609 which has not yet been received and requests an additional 6 months to close the estate. JTD.**
4. Need Ex-parte Petition/Order for Final Discharge.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for **10/02/18**.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 04/03/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600902

CASE NAME: MARY K LATENDRESSE

HEARING:

first and final Account and Report of US TRUST BANK OF AMERICA
and Petition for allowance of fees filed.

COUNSEL:

FAMILY SERVICES OF REDLANDS(TP)...KATHLEEN B ALBREKTSON
MARY K LATENDRESSE (DEC)...
US TRUST BANK OF AMERICA (PET)...FULLERTON LEMANN SCHAEFER &

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees
by Executor, U.S. Trust, Bank of America ["Petitioner"].

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

1. Accounting period 11/12/15 to 10/31/17.
2. Assets on Hand \$204,393.72 consisting of cash.
3. Statutory fees of \$8,000.84 requested. Calculated.
4. Total Charges and Total Credits to Summary of Account [LF, p. 12] do not match. **Need** corrected Summary and affected schedule(s).
5. **Need** bank/financial statement from Peoples Bank of Macon to support supplemental inventory filed on 08/14/17.
6. Petitioner requests authority to withhold \$2,500 as a reserve. JTD.
7. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 4-5 then Court's discretion. If approved, set next hearing for
receipt and final discharge for **04/09/19**.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 04/03/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1701042

CASE NAME: MTR OF DINATO YU CUA

HEARING:

Spousal Property Petition hearing.

COUNSEL:

CONSULEO V LEE (PET)...CHRISTOPHER R ABRAMS
DINATO YU CUA (DEC)...

GENERAL INFORMATION:

Continued from 02/06/18 at request of counsel. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Consuelo V. Lee ["Petitioner"].

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

1. Petitioner requests a determination and confirmation of property passing to the surviving spouse. Specifically, real property located in Hacienda Heights in Los Angeles County. However, petitioner does not set forth facts sufficient to establish a community property interest in the California real property. **Supp. (03/12/18) indicates parties were married on 03/18/87, where, Decedent owned a 1/3rd interest as an unmarried man, in the subject real property. On 08/17/87, the remaining 2/3rd interest were transferred to the petitioner and Decedent as spouses by Quitclaim Deed recorded on 08/26/87, in LA County. However, although the Quitclaim Deed detailed the marital status, it failed to mention any right of survivorship. Petitioner, by means of this Petition, seeks to confirm her 2/3rd interest in the Property and pass the 1/3rd interest owned individually by the Decedent to her, so Petitioner will own 100% of the Property. Subject property interest appears to be Decedent's separate property.**
2. Copy of Grant Deed dated 07/03/86 [affixed at LF, p.9 to petition] indicates property was initially held in a Joint Tenancy by Decedent and another couple. Quitclaim Deed dated 08/17/87 [LF, p12], reflects property was then quitclaimed to Decedent and Petitioner, but does not indicate; in what capacity. **See note 1.**
3. Decedent died intestate with 4 issues who would also share a two-thirds distribution in the estate per Pr.C. §6401 if the real property is separate property

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

of decedent. **Disclaimers filed, by all issue, in favor of petitioner are untimely.**

4. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion

(nb)

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Superior Court of Calif, County of San Bernardino

Page: 4

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/03/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1701073

CASE NAME: JUAN CARLOS CABALLERO

HEARING:

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

COUNSEL:

CRISTINA KALBERMATTER (PET)...DARLING LAW OFFICES
JUAN CARLOS CABALLERO (DEC)...

GENERAL INFORMATION:

Continued from 02/13/18 at request of counsel to republish notice of petition.

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

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

1. Petition alleges she is the sole heir and waives bond. Estimated estate valued at \$61,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
2. No proposed order/letters. Submit after Hearing.

RECOMMENDATION:

Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **04/23/19**. 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

Page: 5

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

DATE: 04/03/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800163

CASE NAME: JOSEPH THOMAS PAPAC

HEARING:

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

COUNSEL:

JOSEPH THOMAS PAPAC (DEC)...
PAULA J GOODHEART (PET)...GAUDY LAW, INC

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by daughter, Paula J. Goodheart ["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).
2. Nominated co-executor, Nicholas Papac, declines to act [LF, p. 13].
3. Need proof of publication.
4. Need Notice of Petition to Administer Estate with proof of service.
5. ~Proposed Form Order/Letters 02/21/18.

RECOMMENDATION:

Need to clear notes 3-4 then Court's discretion. If approved, set future hearing for Accounting Review on **06/11/19**. 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

Page: 6

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

DATE: 04/03/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800192

CASE NAME: ADDIE MAY COLLINS

HEARING:

Spousal Property Petition hearing.

COUNSEL:

ADDIE MAY COLLINS (DEC)...
GLENN E COLLINS (PET)...CHRISTOPHER A SCHUMATE

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Glenn E. Collins ["Petitioner"].

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

1. Petitioner requests a determination and confirmation of property passing to the surviving spouse as community property. Specifically real property at Highland, CA, in San Bernardino County.
2. Petitioner indicates Petitioner and Decedent were married for 30 years then divorced for 12 years and then remarried in 2003 to be married for another 14 years until the decedent died.
3. Petition indicates all property was acquired *previous* to the marriage by the Decedent but the property was later commingled with community property and allegedly transmuted to community property.
4. Petitioner and Decedent deeded the 7127 Vine Property from Decedent to each other as joint tenants in March 31, 2003 [see Interspousal Transfer Deed. LF. p. 10]. Thereafter, Petitioner and Decedent refinanced the subject property, wherein, it was alleged that taking Petitioner's name off title would be more convenient [LF, p. 12]. Petitioner claims Petitioner and Decedent never got around to putting Petitioner's name back on the title.
5. Petitioner states there is no agreement between the Decedent and the surviving spouse, or between the spouses, providing for a non-*pro rata* division of the aggregate value of the community property or quasi-community property, or both and proffers Bourdeau & Eclavea, 32 California Jurisprudence 3d, Family Law (2017) § 474, that states separate property may be transmuted into

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community property just by the actions of the parties when it is impossible to segregate separate and community property.

6. Petitioner, therefore, alleges that the 7127 Vine Property is community property because it was partially encumbered when it was brought into the marriage and community property was used to pay off all encumbrances. However, while petitioner may be entitled to a Moore-Marsden Credit, it does not appear subject property can be deemed community property.
7. Decedent died intestate with two adult children who would also share a two-thirds distribution in the estate per Pr. C. §6401 if the real property is deemed the separate property of decedent.
8. ~Proposed Form Order 03/01/18.

RECOMMENDATION:

Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 04/03/18 TIME: 8:30 DEPT: S35P

CASE#: SC SS8402

CASE NAME: IN THE MTTR OF PHILLIP A BOWER

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MARGIE NEAL	(CPE)...PRO/PER
PHILLIP A BOWER	(CEP)...WALTER T. MOORE
REGENA L GRAVELY	(CPE)...PRO/PER

XREF: SCSS01006 (Scott J Robinson) **heard in S36P on 04/03/18**

GENERAL INFORMATION:

Order Appointing Margie L. Neal, Temporary Conservator of the Person and Estate entered 07/01/88.

Order Appointing Margie L. Neal, Conservator of the Person and Estate entered 07/29/88.

THIS CASE IS SET FOR HEARING ON Petition for Successor Conservatorship, person and estate by Regena L. Gravelly [friend], nominee by current Conservator of the person and estate, Margie L. Neal ["Petitioner"].

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

1. There is currently no vacancy. **Need** resignation by current conservator and petitioner, Margie L. Neal per Pr. C. § 2660.
2. Conservatee appears to receive income from SSI. Question the need for estate powers? Court to inquire.
3. Petitioner requests no bond be required as conservatee receives only SSI and requiring bond would be a hardship. JTD.
4. Petitioner requests Pr. C. §2590 powers to operate, at the risk of the estate a business, farm, or enterprise constituting an asset of the estate and the power to pay, collect, compromise, or otherwise adjust claims, debts or demands upon the guardianship or conservatorship.
5. Proposed conservatee is developmentally disabled. **Need** appointment of counsel and report by same.
6. Medical Capacity Declaration filed.
7. Court Investigator Report filed.

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8. This petition is for general, and not limited, conservatorship. An IRC report is therefore optional per Pr.C. 1827.5(b). Does court wish to require? JTD.
9. Certificate of Completion re Conservatorship Class filed.
10. Notice does not include siblings, Cathy Schwibowland or Arnold E. Bower.
Need proper service.
11. ~Proposed Form Order/Letters 02/22/18.

RECOMMENDATION:

Court to appoint counsel, need to clear notes 1, 5 & 10 then Court's discretion. If approved, set hearing for Compliance Review for **11/06/18** 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.

Set Accounting Review hearing (as to Margie Neal) in **60 days** beginning 01/01/18 per Local Rule 20-1406 and Pr. C. §2620.

If estate powers are granted as to Successor, set Accounting Review hearing for **06/11/19**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 8

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/03/18 TIME: 8:30 DEPT: S35P

CASE#: SPR SS05812

CASE NAME: ESTATE OF ROBERT D. GONZALES

HEARING:

Hearing re Final Discharge

COUNSEL:

BARBARA A CORRAL	(RONDA A MIDDLETON
BRYAN C. HARTNELL	(HARTNELL LAW GROUP
HEIR BUYOUT COMPANY	(TP)...PRO/PER
MARK J ANDREW FLORY ESQ	(PET)...MARK J. FLORY
MICHAEL A. GONZALES	(PET)...TREVOR D. MARTIN
MICHAEL GONZALES	(PET)...HORSPOOL & HORSPOOL
ROBERT D. GONZALES	(DEC)...

GENERAL INFORMATION:

Continued from 02/06/18. No appearance. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order on First and Final Report entered 01/31/17.
2. Receipts filed.
3. ~Ex-Parte Petition/Order for Final Discharge 03/07/18

RECOMMENDATION:

RFA.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 9

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 04/03/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1701293

CASE NAME: ALFONSO FERNANDEZ FAMILY GRANTOR TRUST DATED
4/14/

HEARING:

Petition for Order confirming terms of trust and confirming that
real property is trust asset that is etc

COUNSEL:

ALFONSO FERNANDEZ FAMILY GRANT (TRU)...

LORENZO FERNANDEZ

(TEE)...ROBERT E. HALES

Currently under review by Legal Research.
(LR)

Notice given.
(nb)

Superior Court of Calif, County of San Bernardino

Page: 10

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/03/18 TIME: 8:35 DEPT: S35P

CASE#: TRU PS1800003

CASE NAME: MELVILLE T. DEEN AND BARBARA W. DEEN TRUST

HEARING:

Petition for ORDER DESIGNATING REAL PROPERTY TO BE AN ASSET
OF THE LIVING TRUST

COUNSEL:

JAMES M DEEN

(PET)...RONALD W ASK

THE MELVILLET.DEEN AND BARBARA

(TRU)...

Currently under review by Legal Research.
(LR)

Notice:

Notice filed.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 11

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

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

CASE#: CON PS1400211

CASE NAME: Ingeburg Elisabeth Goetz

HEARING:

Hearing re Final Discharge

COUNSEL:

INGEBURG ELISABETH GOETZ (CEP)..DONNASUE ORTIZ
MELODIE Z SCOTT (CPE)...TREVOR D MARTIN
MELODIE Z SCOTT (PET)...BRYAN C HARTNELL

X-REF: PROPS1501189; CIVDS1311656

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Settling First and Final Account entered 03/28/17.
2. Need receipt from personal representative of conservatee's estate.
3. Need Ex-Parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 12

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

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

CASE#: CON PS1400372

CASE NAME: MTR OF EDWARD DAVIS

HEARING:

First Account and Report of TIFFANY DAVIS and Petition for allowance of fees filed.

COUNSEL:

DIANE VENABLE	(OBJ)...PRO/PER
EDWARD DAVIS	(CEP)...
TIFFANY DAVIS	(CPE)...JOSEPH B MCHUGH
TIFFANY DAVIS	(PET)...JEFFREY LISS

Waiver of Court Fees and Costs filed by TIFFANY DAVIS is GRANTED
Waiver of Court Fees and Costs filed by DIANE VENABLE is GRANTED
TOTAL FEES WAVIED TO DATE: \$1440.44

XREF: PROPS1500278 (Edward Davis)

GENERAL INFORMATION

Tiffany Davis appointed temporary Conservator of person and estate on 01/07/15.
Continued from **09/10/15**. Court suggested petitioner consult with legal aid for assistance.

Continued from **11/12/15**. Petitioner is now pro per.

Continued from **02/18/16**. Tiffany Davis did not appear; citation issued.

Continued from **05/26/16 and 10/26/16**. Tiffany Davis to personally appear. Letter to judge on 10/13/16 not accepted as accounting.

Continued from **01/18/17**. Tiffany Davis to file account by 03/22/17.

Continued from **04/12/17**. Tiffany Davis ordered to return and filed account by 06/19/17.

Continued from **07/19/17**. Matter is continued to 11/29/17; Court notes that the deadline for the filing of complete accounting is 4PM on 10/30/17. Court makes admonishment that if accounting is not filed by the deadline, that Tiffany Davis will be surcharged the amount of \$2,500. Tiffany Davis states she understands the admonishment regarding the surcharge.

Continued from **11/29/17** on courts motion to 02/28/18 and sets an additional OSC re Surcharge of \$2,500 on Tiffany Davis for the same date. Court notes that it will impose

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an additional surcharge of \$2,500.00 if Tiffany Davis fails to file the appropriate accounting before the hearing date of February 28, 2018.

Continued from 02/28/18. Accounting filed and set for 04/03/18. Court vacates OSC re Surcharge set for 02/28/18.

THIS CASE SET FOR HEARING ON **Amended (05/26/16, 07/18/16 & 02/06/18)** First and Final Account and Petition for Allowance of Fees; **and Petition for Waiver of Surcharge of \$2,500** by temporary conservator/daughter, Tiffany Davis.

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

1. Accounting period 01/07/15 – 03/17/15. Conservatee died on 03/17/15. **Need post-death accounting per Pr. C. § 2620.**
2. Assets on hand **\$348,653.93** consisting of real property. However, the real property is still being shown as a non-cash asset at the end of account period. **Need corrected Summary and affected schedules.**
3. **Bond of \$32,000** ordered on 02/18/15. Petitioner indicates she did not have enough time to obtain the bond because Conservatee passed away before the bond could be obtained.
4. **Petitioner waives compensation.**
5. **Attorney requests fees in the reduced amount of \$1,500.00. Billed at \$300-\$400/hour for 11 hours' attorney time [LF, pgs. 36-38]. Generally described. Question how counsel is to be paid as there are no cash assets? JTD.**
6. **Need final Inventory and Appraisal per Pr.C. § 2610.**
7. **Need bank statements per local rule and Pr. C. § 2620(c) to cover period prior to appointment.**
8. **Receipts – Schedule A reflects a cash advance from Capital One Card in the amount of \$3,800. Need further clarification via verified supplement.**
9. **Disbursements – Schedule C requires further clarification via verified supplement as to the following:**
 - a. **Various insufficient Funds Fees;**
 - b. **Tiffany Davis – loan payment;**
 - c. **Capital One credit card payments;**
 - d. **Chase-payment on card;**
 - e. **T-mobile cell phone & service;**
 - f. **Herbs, Ganoderma/Cordyceps;**
 - g. **PrepExpress payments;**
 - h. **Restraining Order fees;**
 - i. **Payment to Accountant for Preparing this Accounting.**
10. **Petitioner indicates the real property owned by the Conservatee was distributed to Conservatee's surviving spouse as part of the probate proceedings by the court order issued on 09/03/15 in the related case.**
11. **Need notice of hearing and proof of service to spouse and conservatee.**
12. **Petitioner requests the Court waive the \$2,500 surcharge imposed on Conservator. JTD.**
13. Citation returned served for Tiffany Davis.

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14. Objections filed by attorney for conservatee on 09/09/15.

15. Amended accounting filed 10/13/16; Court does not accept as an accounting.

RECOMMENDATION

Need to clear notes 1-2, 5-9 & 11 via amended account to be filed 30 days prior to hearing and set on a first check calendar no sooner than **05/17/18**.

(lc/nb/lc/lh/nb)

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Superior Court of Calif, County of San Bernardino

Page: 13

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

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

CASE#: CON PS1500362

CASE NAME: BARBARA JEAN HIRSCHMANN

HEARING:

Accounting Review by ***

COUNSEL:

BARBARA JEAN HIRSCHMANN	(CEP)...WALTER T. MOORE
CHRISTIE M. DAVIDSON	(CPE)...HORSPOOL & HORSPOOL
CHRISTIE M. DAVIDSON	(CPE)...TREVOR D. MARTIN
MICHELE GIBBONS	(PET)...CRAIG M PARKER
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL

GENERAL INFORMATION

Continued from 07/11/17 attorney Craig Parker indicates to the court that Barbara Jean Hirschmann passed away on 06/08/17. Continuance requested to file accounting.

Continued from 10/03/17 at request of counsel. Account to be filed by 01/16/18.

Continued from 02/13/18 at request of counsel to submit corrections to accounting. Notice to be given by Attorney Parker.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Court appointed Barbara Jean Hirschmann conservator of the person and estate on 07/12/16, \$70,000 bond.
2. Final Inventory and Appraisal filed 02/21/17. Estate valued at \$4,651.84. However, need amended inventory that includes real property appraised by Probate Referee.
3. **Need 1st and final account to include pre and post-death accounting periods along with copy of Trustee's Deed upon Sale.**
4. Per minute order dated 03/21/17, counsel informed the court that the real property was foreclosed and the conservatee was still in possession subject to lawsuit. This is an estate with a loss.

RECOMMENDATION

Inquire status. If continued, set on Wednesday calendar as originally set.

(lh/nb/cs/nb)

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Superior Court of Calif, County of San Bernardino

Page: 14

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

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

CASE#: CON PS1700001

CASE NAME: ROLAND LEVONE HAMILTON JR

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ROLAND LEVONE HAMILTON

COUNSEL:

JACQUELYN M HILL (CPE)...PRO/PER
ROLAND LEVONE HAMILTON JR (CTP)...PRO/PER

GENERAL INFORMATION

Matter set at **09/19/17** hearing due to non-appearance and failure to file. Notice by Judicial Assistant.

Continued from **12/05/17**. No appearance. Court imposes sanctions on conservator in the amount of \$500.00 for failure to appear/failure to file. Court sets OSC re sanctions in the amount of \$1,500.00 for January 30, 2018 and

notes that if conservator fails to appear, court will impose additional sanctions in the amount of \$1,500.00. Notice by Judicial Assistant.

Continued from 01/30/18. Court orders conservator to file notice of change of address today before leaving the courthouse and is to file the compliance review documents by March 20, 2018.

THIS CASE IS SET FOR HEARING ON Compliance Review.

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

1. Jacquelyn Hill appointed Conservator of the person.
2. Proof of Service to Notification of Conservatee's Rights is signed by petitioner. **Need** proper service by someone over age 18 and not a party to the action.
3. Appropriate Level of Care and Care Plan filed.

RECOMMENDATION

Need to clear note 2.

(lh/nb)

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

Superior Court of Calif, County of San Bernardino

Page: 14A

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: CON PS1700222

CASE NAME: EDGARDO CONTRERAS TORRES

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of EDDIE OROZCO TORRES

COUNSEL:

EDDIE OROZCO TORRES
EDGARDO CONTRERAS TORRES

(PET)...PRO/PER
(CEE)...SHERRI L KASTILAHN

GENERAL INFORMATION

Order Appointing Eddie Orozco Torres Limited Conservator of the person entered
08/01/17, no bond.

**Continued from 03/06/18 for notes to be cleared. Notice to be given by Sherri
Kastilahn to the conservators.**

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

Page: 15

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: CON PS1700102

CASE NAME: HORTENCIA M. DE LA CRUZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of RUDY DE LA CRUZ

COUNSEL:

HORTENCIA M DE LA CRUZ (CEP)...PRO/PER

RUDY DE LA CRUZ (CPE)...PRO/PER

X-REF: PROPS1400667

GENERAL INFORMATION

Rudy De La Cruz (son) appointed conservator of the person and estate on 08/29/17,
\$20,000 bond.

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

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

1. Decedent passed away on 12/31/17.
2. Notification of Conservatee's Rights filed. However, section 5 to Proof of Mailing is incomplete. Question whether a conformed copy of the Order Appointing Probate Conservator was included? JTD.
3. Determination of Conservatee's Appropriate Level of Care filed.
4. Care Plan filed.
5. Final Inventory & Appraisal filed.
6. Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
7. Need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C. §2313.

RECOMMENDATION:

Inquire status.

(nb)

Future Hearing:

11/06/18 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

Page: 16

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: CON PS1700103

CASE NAME: MTR OF LAURA KARINA BONILLA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of JUANA GRIJALVA

COUNSEL:

JUANA GRIJALVA

(CP)...PRO/PER

LAURA KARINA BONILLA

(CTP)...JEANNE E KENNEDY

GENERAL INFORMATION

Juana Grijalva appointed Limited Conservator of the Person on 08/29/17.

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; Determination of Conservatee's
Appropriate Level of Care; and Care Plan filed.

RECOMMENDATION:

None.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 17

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: CON PS1800022

CASE NAME: MTR OF RAUL DELGADO

HEARING:

Petition for Appointment of Conservator

COUNSEL:

EVANGELINA ROCHA	(CP)...PRO/PER
JENNIFER DELGADO	(CP)...PRO/PER
RAUL DELGADO	(CTP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by mother, Evangelina Rocha and sister, Jennifer Delgado ["Petitioners"].

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. **Need** appointment of counsel and report by same.
3. 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. Citation returned served.
7. **Need** Court Investigator Report.
8. **Need** Inland Regional Center Report.

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

9. Certificates of Completion re Conservatorship Class filed.
10. ~Proposed Form Order/Letters 01/23/18.

RECOMMENDATION:

Court to appoint counsel then need to clear notes 2 & 7-8. If approved, set hearing for Compliance Review for **11/06/18** 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

Page: 18

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PA

DATE: 04/03/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS0800488

CASE NAME: THE JAQUELIN Q TYLER TRUST

HEARING:

first and final Account and Report of PUBLIC ADMINISTRATOR and
Petition for allowance of fees filed.

COUNSEL:

PUBLIC ADMINISTRATOR (PET)...CRAIG M PARKER

THE JAQUELIN Q TYLER TRUST (TRU)...

GENERAL INFORMATION:

PA appointed Successor Trustee on 07/01/08.

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

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

1. Accounting period 09/11/07 to 11/15/17.
2. Assets on Hand \$7,230.42 consisting of cash.
3. Petitioner agrees to accept the sum of \$2,595.42 as payment for service.
Itemized [LF, pgs. 24-28]. JTD.
4. Petitioner requests extraordinary fees of \$180 for services rendered in
connection with the sale of personal property. Billed at \$60/hour for a total of 3
hours' time. Generally described [LF, p. 29]. JTD.
5. Attorney requests fees of \$3,640.00. Billed at \$350/hour for 10.4 hours'
attorney time. Itemized [LF, p. 31]. JTD.
6. Inventories and Appraisals filed on 10/21/08, 11/18/08 and 11/20/18 have one
or more of the following deficiencies:
 - a. Not dated at signature line;
 - b. Statement about the Bond Section is not complete, dated or signed.
Need complete inventories.
7. Petition indicates the real property was foreclosed on 02/19/09. Question
whether any surplus funds remained? Does Court wish to require a copy of
Trustee's Deed upon Sale? 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.**

8. Petitioner requests authority to withhold the amount of \$2,000 as a reserve.
JTD.
9. ~Proposed Order 01/09/18.

RECOMMENDATION:

Need to clear note 6 then Court's discretion. If approved, set next hearing for receipts and final discharge for **04/09/19**.

(nb)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/03/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1500648

CASE NAME: MTR OF PATRICIA MAE SWAIN

HEARING:

Probate status report filed.

COUNSEL:

ALLISON TRACEY HUTTON	(PET)...SCOTT A HANCOCK
BARBARA JEAN MOSLEY	(PET)...SCOTT A HANCOCK
BARTON K PEVEY	(PET)...SCOTT A HANCOCK
BERRY MOSLEY STILL	(PET)...SCOTT A HANCOCK
BOYD R MOSLEY	(PET)...SCOTT A HANCOCK
CARL L PEVEY	(PET)...SCOTT A HANCOCK
CAROL A SEYMOUR	(PET)...SCOTT A HANCOCK
CAROL SUE NOLTE	(PET)...SCOTT A HANCOCK
CATHY L HARTE	(PET)...SCOTT A HANCOCK
CHRISTOPHER DEAN MOSLEY	(PET)...SCOTT A HANCOCK
CONNIE L MORRIS	(PET)...SCOTT A HANCOCK
DANA ALAN PEVEY	(PET)...SCOTT A HANCOCK
DANA L SOLTE	(PET)...SCOTT A HANCOCK
DANIEL CLOUSER	(PET)...SCOTT A HANCOCK
DAVID H MOSLEY	(PET)...SCOTT A HANCOCK
DEBORAH JEAN ZULAUF	(PET)...SCOTT A HANCOCK
DEE W MURPHY	(PET)...SCOTT A HANCOCK
DIANA L HOOTS	(PET)...SCOTT A HANCOCK
DIANNE KATHLEEN LORENZ	(PET)...SCOTT A HANCOCK
DONNA F WESTERFIELD	(PET)...SCOTT A HANCOCK
DOROTHY M KNOX	(PET)...SCOTT A HANCOCK
ERIC F FULLER	(PET)...SCOTT A HANCOCK
GARY L MOSLEY	(PET)...SCOTT A HANCOCK
JAMES A DEHNER	(PET)...SCOTT A HANCOCK
JANET TRONE	(PET)...SCOTT A HANCOCK
JANET WALKER	(PET)...SCOTT A HANCOCK
JANIS CLINE MCCURLEY	(PET)...SCOTT A HANCOCK
JEANETTE L NEIDERHISER	(PET)...SCOTT A HANCOCK
JOHN STEVEN MOSLEY JR	(PET)...SCOTT A HANCOCK
JONELLE REXENES	(PET)...SCOTT A HANCOCK

JOYCE KAY HUGHES	(PET)...SCOTT A HANCOCK
JUDITH K OGLE	(PET)...SCOTT A HANCOCK
JUDY MCCLEARY	(PET)...SCOTT A HANCOCK
LADONNA ANN WILCOX	(PET)...SCOTT A HANCOCK
LEONARD J EBREY	(PET)...SCOTT A HANCOCK
LESLIE ANN LINDSLEY	(PET)...SCOTT A HANCOCK
LESLIE DAWN PEVEY	(SCOTT A HANCOCK
LYNN D PEVEY	(SCOTT A HANCOCK
LINDSAY BOSTON	(PET)...SCOTT A HANCOCK
LLOYD J MOSLEY	(PET)...SCOTT A HANCOCK
LORI P DEVAUGHN	(SCOTT A HANCOCK
LORRI L GLOSSOP	(PET)...SCOTT A HANCOCK
MARILYN J TRUITT	(PET)...SCOTT A HANCOCK
MARY LAUGHARY	(PET)...SCOTT A HANCOCK
MELISSA K FARLEY	(TP)...SCOTT A HANCOCK
MELISSA RAMSAY	(PET)...SCOTT A HANCOCK
MISTY APRIL CRONAN	(PET)...SCOTT A HANCOCK
NORMA JEAN DEORNELLAS	(SCOTT A HANCOCK
NORMAN T WALKER	(PET)...SCOTT A HANCOCK
PAMELA SUE KILMER	(PET)...SCOTT A HANCOCK
PATRICIA MAE SWAIN	(DEC)...
PEGGY A LANE	(PET)...SCOTT A HANCOCK
PEGGY L LARSON	(PET)...SCOTT A HANCOCK
POLLY SAMPSON	(PET)...SCOTT A HANCOCK
RACHEL A MOSLEY	(PET)...SCOTT A HANCOCK
RAHN HEART	(PET)...SCOTT A HANCOCK
REBECCA L HOWELL	(PET)...SCOTT A HANCOCK
RHONDA ROYER	(SCOTT A HANCOCK
RICHARD L EBREY	(PET)...SCOTT A HANCOCK
RICHARD L PEVEY	(PET)...SCOTT A HANCOCK
RICHARD W SMITH	(PET)...SCOTT A HANCOCK
RUBEN J ROYER	(PET)...SCOTT A HANCOCK
SAMANTHA MCBRIDE	(PET)...SCOTT A HANCOCK
SANDRA K FORD	(PET)...SCOTT A HANCOCK
SANDRA S DAVID	(PET)...SCOTT A HANCOCK
SCOTT LEE MOSLEY	(PET)...SCOTT A HANCOCK
SCOTT ROYER	(SCOTT A HANCOCK
SHARON M MIDDENDORF	(PET)...SCOTT A HANCOCK
SONYA L ROWE	(PET)...SCOTT A HANCOCK
TERESA L ADMIRE	(PET)...SCOTT A HANCOCK
THE SAN BERNARDINO COUNTY PUBL	(PET)...CRAIG M PARKER
THOMAS L WALKER	(PET)...SCOTT A HANCOCK
TONYA L CROSIER	(PET)...SCOTT A HANCOCK
TWYLA LOUISE PITTMAN	(SCOTT A HANCOCK
VELMA M MOSLEY	(PET)...SCOTT A HANCOCK
WILLIAM E CLINE jr	(PET)...SCOTT A HANCOCK

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.**

GENERAL INFORMATION:

Continued from 02/07/17 and 01/08/18 at the request of counsel.

THIS CASE IS SET FOR HEARING ON Status Report (filed 12/05/16).

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

1. Probate status report was approved on 02/07/17 and matter was continued to clear probate notes.
2. Petitioner, Public Administrator, alleged the estate was not in a condition to be closed as Petitioner had possibly located an additional account at Wells Fargo Bank and was attempting to collect said account.
3. Petitioner requested an additional 12 months to close the estate.
4. Need accounting or updated status report.

RECOMMENDATION:

Need to clear note 4. Inquire status. If approved, set next hearing for Accounting Review for **04/09/18**.

(nb/cs/nb)

Superior Court of Calif, County of San Bernardino

Page: 20

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/03/18 TIME: 10:00 DEPT: S35P

CASE#: SPR SS06771

CASE NAME: VERNICE OWENS INDIVIDUAL TRUST

SEE ALSO 20A

HEARING:

first and final Account and Report of SAN BERNARDINO COUNTY
PUBLIC ADMINISTRATOR and Petition for allowance of fees
filed.

COUNSEL:

LAWRENCE R OWENS	(TEE)...PRO/PER
SAN BERNARDINO COUNTY PUBLIC P	(PET)...CRAIG M PARKER
ZOANNE MARTZ	(PET)...HARTNELL LAW GROUP
ZOANNE MARTZ	(PET)...JACK B OSBORN

GENERAL INFORMATION:

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

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

1. Accounting period 04/22/16 to 08/21/17.
2. Assets on Hand \$3,571.44 consisting of cash.
3. Petitioner requests compensation in the sum of \$1,000. JTD.
4. Petitioner requests extraordinary fees of \$480 for services rendered in
connection with the sale of real property. Billed at \$60/hour for a total of 8
hours' time. Generally described [LF, p. 26]. JTD.
5. Attorney requests fees of \$5,110.00. Billed at \$350/hour for 14.6 hours'
attorney time. Itemized [LF, p. 28]. JTD.
6. Petitioner requests authority to withhold the sum of \$500 as a reserve. JTD.
7. ~Proposed Order 01/09/18.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for
04/09/19.

(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

Page: 20A

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/03/18 TIME: 10:00 DEPT: S35P

CASE#: SPR SS06771

CASE NAME: VERNICE OWENS INDIVIDUAL TRUST

SEE ALSO 20

HEARING:

FIRST AND FINAL Account and Report of ZOANNE MARTZ and Petition
for allowance of fees filed.

COUNSEL:

LAWRENCE R OWENS	(TEE)...PRO/PER
SAN BERNARDINO COUNTY PUBLIC P	(PET)...CRAIG M PARKER
ZOANNE MARTZ	(PET)...HARTNELL LAW GROUP
ZOANNE MARTZ	(PET)...JACK B OSBORN

GENERAL INFORMATION

Continued from 01/04/18 and 03/06/18 at request of counsel.

THIS CASE SET FOR HEARING ON Final Account and Report of Prior 2nd Successor
Trustee, Zoanne Martz, by Bryan Hartnell.

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

1. Accounting period 06/11/11 – 06/14/17.
2. Assets on hand \$0.
3. Assets of \$48,000, parcels of property, were allegedly distributed to 3rd
Successor Trustee; Public Administrator.
4. Prior Trustee Zoanne was removed on 04/22/16.
5. Petitioner/Attorney Hartnell seeks fees of \$58,829.70 for 263.30 hours at
\$25/425 per hour for paralegal and attorney services. There are no liquid
assets in the Trust. JTD
6. No proposed order. Submit after hearing.

RECOMMENDATION

Court's discretion.

(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
Page: 21
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 04/03/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1100292

CASE NAME: FAITH E BATER

HEARING:

Petition for instructions to donate property

COUNSEL:

TIFFANY L COONEY (PET)...PRO/PER
FAITH E BATER (DEC)...
SAN BERNARDINO COUNTY PUBLIC A (PET)...CRAIG M PARKER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Instruction to Donate Property by Public Administrator ["Petitioner"]. (PR, C. §§9611, 9780)

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

1. At her death, Decedent owned a 2002 Nissan Xterra automobile, valued at \$4,000 on the Inventory and Appraisal, Partial No. 1, filed on 05/17/16.
2. Petitioner has had the 2002 Nissan Xterra for sale for a considerable period of time with no success at obtaining a buyer for it. Petitioner requests that he be authorized to donate the vehicle to a charity who accepts donations of vehicles.
3. Petitioner prays for an order of this Court confirming and approving the donation of the 2002 Nissan Xterra.
4. Proof of Service by Mail to Notice filed on 01/16/18 is not dated at section 4a and signature line. Need proper service.
5. ~Proposed Order 01/10/18

RECOMMENDATION:

Need to clear note 4 then Court's discretion.

(nb)

Future Hearing:

06/05/18 Accounting Review.

Superior Court of Calif, County of San Bernardino

Page: 22

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

MISC

DATE: 04/03/18 TIME: 1:30 DEPT: S35P

CASE#: CON PS1700050

CASE NAME: MTR OF KATHERINE POWELL

HEARING:

Hearing Re: COURT TRIAL (FIRST SESSION)

COUNSEL:

KATHERINE POWEL

(CTE)...MITCHELL I ROTH

PUBLIC GUARDIAN

(CE)...DEPUTY COUNTY COUNSEL

XREF: CONPS1700074 (Willard Powell)

No notes – Court Trial.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 22A

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/03/18 TIME: 1:30 DEPT: S35P

CASE#: CON PS1700050

CASE NAME: MTR OF KATHERINE POWELL

SEE ALSO 22, 22B

HEARING:

Hearing Re: COURT TRIAL (FIRST SESSION)

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

WILLARD POWELL

(CEP)...JEANNE KENNEDY

XREF: CONPS1700050 (Katherine Powell)

No notes – Court Trial

(nb)

Superior Court of Calif, County of San Bernardino

Page: 22B

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/03/18 TIME: 1:30 DEPT: S35P

CASE#: CON PS1700050

CASE NAME: MTR OF KATHERINE POWELL

SEE ALSO 22, 22A

HEARING:

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

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

WILLARD POWELL

(CEP)...JEANNE KENNEDY

XREF: CONPS1700074 MTR OF WILLARD POWELL

GENERAL INFORMATION

Ex parte hearing held 03/20/17. Mitchell Roth states objections on record on behalf of his client. Public Guardian (PG) appointed Temporary Conservator of estate only. No bond required. Court resets hearing currently set for 05/01/17 to 05/08/17. Court appoints Sherri Kastilahn as Guardian Ad Litem for Katherine Powell
Continued from **05/08/17** at request of counsel. Notice to be given by Ramona Verduzco.

Continued from **07/31/17**. Written report received from Sherri Kastilahn (GAL). Matter is contested. Exchange deadline set for 4:00pm on 01/22/18. Court makes Pre Trial Orders.

Continued from **01/22/18**. Matter is set with new trial dates.

Continued from 03/12/18.

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

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

1. No bond - PG.
2. Petitioner seeks Pr. C. § 2590 powers to sell real or personal property of the estate and proceeds to be used for Conservatee's care and personal needs.
3. Petitioner seeks authority to deposit up to \$5,000 in an irrevocable burial trust and authority to abandon and/or donate personal property with value of \$300 or less; storage or a sale would be a burden on the estate.
4. Petitioner seeks medical powers. Capacity Declaration filed 08/03/17.

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. Petitioner seeks dementia powers. Initial report of Counsel Mitchell Roth filed 05/09/17. **Need** report as to amended petition.
6. **Need** report of GAL, Sherri Kastilahn as to amended petition.
7. CI report filed 05/03/17. **Need** CI Report as to amended petition.
8. Confidential memo by CI filed 08/29/17.
9. Return of Citation with Proof of Service filed 10/03/17.
10. Notice was served.

RECOMMENDATION:

Need to clear probate notes 5-7. If approved, set hearing for Compliance Review for **11/06/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **06/11/19**. Any accounting to be filed 30 days in advance.

(lh/nb/lh/ww/nb)

Superior Court of Calif, County of San Bernardino

Page: 23

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/03/18 TIME: 1:30 DEPT: S35P

CASE#: CON PS1700074

CASE NAME: MTR OF WILLARD POWELL

SEE ALSO 23A

HEARING:

Hearing Re: COURT TRIAL (FIRST SESSION)

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

WILLARD POWELL

(CEP)...JEANNE KENNEDY

XREF: CONPS1700050 (Katherine Powell)

No notes – Court Trial.

(nb)

Superior Court of Calif, County of San Bernardino
Page: 23A
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 04/03/18 TIME: 1:30 DEPT: S35P

CASE#: CON PS1700074

CASE NAME: MTR OF WILLARD POWELL

SEE ALSO 23

HEARING:
Petition for Appointment of Conservator

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

XREF: CONPS1700050 (Katherine Powell)

GENERAL INFORMATION

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

Continued from **05/08/17** at request of counsel. Notice to be given by Ramona Verduzco.

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

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

Continued from 03/12/18.

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

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

1. No bond - PG.
2. Petitioner seeks Pr. C. § 2590 powers to sell real or personal property of the estate and proceeds to be used for Conservatee's care and personal needs.
3. Petitioner seeks authority to deposit up to \$5,000 in an irrevocable burial trust and authority to abandon and/or donate personal property with value of \$300 or less; storage or a sale would be a burden on the estate.
4. Petitioner seeks medical and dementia powers. Updated Capacity Declaration filed 08/03/17.
5. Petitioner seeks dementia powers. **Need** report from Counsel Jeanne Kennedy.
6. Petition is incomplete. **Need** verified supplement clarifying the following:
 - a. Section 5f [LF, pg7] as to whether proposed conservatee is developmentally disabled.
7. **Need** report of court-appointed counsel, Jeanne Kennedy.
8. **Need** report of GAL, Walter Moore.
9. **Need** Notice of Hearing and Proof of Service.
10. Return of Citation with Proof of Service filed 03/15/17.
11. Court Investigator's Report filed.
12. **Objections filed 05/02/17 by Willard Powell, Proposed Conservatee.**

RECOMMENDATION: Set for contested hearing.

Need to clear notes 5-9, then Court's discretion. If approved, set hearing for Compliance Review for **11/06/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **06/11/19**. Any accounting to be filed 30 days in advance.

(lh/nb/cs/nb)

Superior Court of Calif, County of San Bernardino

Page: 1

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

DATE: 04/03/18 TIME: 8:30 DEPT: S36P

CASE#: **CIV** RS1400249

CASE NAME: MERCEDES MURRAY -V- DAVINA MICHELLE PATTERSON

HEARING:

Hearing Re: OSC RE: DISMISSAL

COUNSEL:

ARROWHEAD CREDIT UNION	(CC)...KNAPP, PETERSEN &
DAVINA MICHELLE PATTERSON	(DEF)...PRO/PER
MERCEDES MURRAY AND MONICA MUR	(PLA)...OSBORN/LAW

XREF: PROPS1300718 (David Lee Patterson)

GENERAL INFORMATION

Continued from 10/19/17 for dismissal to be filed.

Continued from 01/04/18 at request of Court to verify settlement. Oral report given by Mitchell Roth and Barbara Colino.

Continued from 02/21/18. Court and counsel confer on the record. Matter is continued as parties are awaiting signatures on settlement agreement. Richard Osborn and Blair Berkley are order to appear at next hearing.

THIS CASE SET FOR HEARING ON OSC re Dismissal

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

1. Matter set at settlement OSC on 08/24/17.
2. Counsel Roth to submit application for good faith. Order determining settlement of Plaintiffs to be in good faith filed 09/07/17.

RECOMMENDATION

Court's discretion re OSC.

(lc/lh/nb)

Superior Court of Calif, County of San Bernardino

Page: 2

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

PROBATE

DATE: 04/03/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500415

CASE NAME: ELEANOR A GRIGGS

HEARING:

Petition for FINAL DISTRIBUTION WITHOUT RENDERING ACCOUNT

COUNSEL:

ELEANOR A GRIGGS

(DEC)...

JOANN CHRISTY

(PET)...GUAY P WILSON

THE ELEANOR A GRIGGS LIVING TR

(TRU)...

GENERAL INFORMATION

Continued from 01/25/18.

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Joann Christy, daughter.

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

1. No statutory fees are sought.
2. Both heirs waive accounting.
3. **Need** assets on hand.
4. Proposed Order: 10/31/17; however, does not list assets on hand.

RECOMMENDATION

Need to clear note 3. If approved, set hearing on the filing of receipts and final discharge for **01/31/19**. If continued, set on Thursday calendar as originally set.

(lc/nb)

Superior Court of Calif, County of San Bernardino

Page: 3

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 04/03/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600656

CASE NAME: MTR OF CYNTHIA MARIE THOMAS-WILLIAMSON

HEARING:

Accounting Review by ***

COUNSEL:

DELMAR THOMAS

(PET)...HOLSTROM BLOCK & PARKE

CYNTHIA MARIE THOMAS-WILLIAMSON (DEC)...

GENERAL INFORMATION:

Continued from **10/31/17, 12/19/17 and 01/24/18** 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 08/23/17, full authority, no bond.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb/lh/nb)

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 04/03/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600725

CASE NAME: MTR OF JOSEPH JOHN DUBNICKA

HEARING:

FIRST Account and Report of MICHAEL J DUBNICKA and Petition for allowance of fees filed.

COUNSEL:

DEPARTMENT OF HEALTH CARE SERV	(PRO/PER
JOSEPH JOHN DUBNICKA	(DEC)...
MICHAEL J DUBNICKA	(PET)...DARLING LAW OFFICES
RYAN MICHAEL DARLING	(PET)...RYAN MICHAEL DARLING
SURTEC	(TP)...WOLKIN CURRAN LLP

GENERAL INFORMATION:

Court granted Petition for Removal of Administrator, Michael Dubnicka, on 11/07/17.
Court appointed Public Administrator as successor administrator, no bond.

Continued from 02/21/18 at request of counsel.

THIS CASE IS SET FOR HEARING ON **Amended** (03/05/18) First and Final Account of Ryan Michael Darling on behalf of former administrator, Michael Dubnicka

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

1. Current bond: \$300,000
2. Accounting period: 08/12/12 to **12/04/17**
3. Assets on hand: \$511.90, cash. **Petition alleges Michael J. Dubnicka has absconded with essentially all of the assets of Estate, for which, the PA will need to file a Surcharge against Michael J. Dubnicka, as creditors' claims and attorney fees are owed to Ryan Michael Darling with the remainder being distributed to the Estate's Creditors.**
4. **Attorney requests statutory fees of \$7,400.00.** Calculated. Attorney requests PA be authorized and ordered to pay requested fees.
5. Final Inventory and Appraisal filed 01/30/17 is incomplete at item #5 regarding property tax certificate. **Need** amended form.
6. **Attorney requests extraordinary fees of \$4,441.00 for services** rendered in connection with the sale of real property. Billed at \$350/hour for a total 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.**

- 10 hours' attorney time. Itemized [see supp. 03/05/18-LF, pgs. 17-18].
Attorney requests PA be authorized and ordered to pay requested fees.
7. **Attorney requests reimbursement of costs advanced of \$941.00.**
Itemized. Attorney requests PA be authorized and ordered to pay requested costs.
 8. Summary of Account and Schedule G indicates \$209,104.77 was previously distributed to administrator Michael Dubnicka without prior Court approval. [Acct, 12/04/17, LFpgs4, 8].
 - a. Note: in Petition for Removal filed 07/10/17, attorney alleged former administrator went unresponsive once he realized the estate may be insolvent due to multiple creditors and is believed to have absconded estate funds.
 9. It does not appear preliminary distribution was made to remaining heir, David Dubnicka, entitled to 50% distribution.
 10. There are two creditor's claims filed 01/23/17 from Department of Healthcare Services in the amount of \$564,087.76. **Supp. (03/05/18) indicates claims remain outstanding.**
 11. **Need** Notice of Hearing and Proof of Service to include Public Administrator and creditors.
 12. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 5 & 11 then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **04/08/19**. If continued, set on Wednesday calendar as originally set.

(lh/nb)

Superior Court of Calif, County of San Bernardino

Page: 5

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 04/03/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600840

CASE NAME: MTR OF WILLIAM ROGER WHETSTONE

HEARING:

Probate status report filed.

COUNSEL:

JUNE SCOGGINS HERNANDEZ (PET)...CRAIG M PARKER

WILLIAM ROGER WHETSTONE (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report and Petition for Preliminary Distribution by Administrator, William R, Whetone ["Petitioner"]. (Pr. C. §§12200, 11620)

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

1. Petitioner alleges the estate is not in a condition to be closed as Petitioner is attempting to collect personal property belonging to the decedent located in a safe deposit box in Missouri and will need additional time in order to try and marshal said assets.
2. Petitioner requests an additional 12 months to close the estate.
3. Assets on Hand \$304,116.25 in cash.
4. Current bond of \$322,000.00.
5. Petitioner requests she be authorized to make a preliminary distribution to decedent's three heirs, in the amount of \$25,000, each. JTD.
6. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **04/09/19**.
(nb)

Superior Court of Calif, County of San Bernardino

Page: 6

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 04/03/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600866

CASE NAME: ANTONIA MCGUFFIN

HEARING:

Hearing re Final Discharge

COUNSEL:

ANTONIA MCGUFFIN (DEC)...

CHRISTOPHER LEE MCGUFFIN (PET)...FULLERTON LEMANN SCHAEFER

VACATED – final discharge entered on 02/28/18.

(nb)

Superior Court of Calif, County of San Bernardino
Page: 7
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 04/03/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700375

CASE NAME: MTR OF LAUREL ALICE GARCIA

HEARING:

First and Final Account and Report of JEFFREY ALLEN NYE and
Petition for allowance of fees filed.

COUNSEL:

JEFFREY ALLEN NYE (PET)...JASON L GAUDY
LAUREL ALICE GARCIA (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of
Account and for Fees by Administrator, Jeffrey A, Nye ["Petitioner"].

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

1. All heirs waive accounting.
2. Assets on hand \$328,257.50 consisting of \$8,257.58 cash and remaining in real property.
3. Petitioner has elected to receive \$1,390.08 in lieu of full statutory fees.
4. Attorney has agreed to accept \$5,000 in lieu of full statutory fees. Calculated.
5. Need copies of bank statement to support date of death balance from LOGIX Checking and Saving Accounts
6. Sibling, Glenda Ferronato, disclaims her interest to real property, in favor of petitioner. Disclaimer [LF, p18] is timely.
7. Need Notice of Hearing with proof of service.
8. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 5 & 7 then Court's discretion. If approved, set next hearing for
final discharge on **04/09/19**.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 04/03/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700784

CASE NAME: MTR OF MI YANG

HEARING:

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

COUNSEL:

CHOONG GEOL YANG (PET)...ANDREW KIM
MI YANG (DEC)...

GENERAL INFORMATION:

Continued from 11/07/17. No assets at this time – wrongful death litigation pending.
Note 3 cleared, the brother (petitioner) is the sole heir.

**Continued from 12/19/17 and 01/24/18 (no appearance) on courts motion. Notice
by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full
authority under IAEA by brother, Choong Geol Yang [“Petitioner”]

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

1. Petition alleges all heirs waive bond. However, the only bond waiver is signed
by Attorney Kim. **Need** Mandatory Waivers of Bond by Heir or Beneficiary.
Estimated value of estate is not given. The Court may for good cause require
that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c).
2. Section 5(7) or (8) to petition regarding issue of a predeceased child is blank.
Need verified supplement.
3. **Need** proof of publication.
4. Petitioner alleges that petitioner is the sole beneficiary and waives bond.
5. ~Proposed Form Order/Letters 08/04/17.

RECOMMENDATION:

Need to clear notes 1-3 then Court’s discretion re: bond. If approved, set future
hearing for Accounting/Status Review on **06/11/19**. Any account to be filed 30 days’ in
advance of hearing. Note requirements of Local Rules.

(nb/lh/nb)

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

Superior Court of Calif, County of San Bernardino

Page: 9

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 04/03/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700916

CASE NAME: ALFONSO LOPEZ GONZALEZ

HEARING:

First and final Account and Report of RUBEN GONZALEZ and
Petition for allowance of fees filed.

COUNSEL:

ALFONSO LOPEZ GONZALEZ (DEC)...

RUBEN GONZALEZ (PET)...CHARLENE L USHER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by Administer w/Limited Authority, Ruben Gonzalez ["Petitioner"].

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

1. All heirs waive accounting.
2. Personal property is listed on Attachment 1 to Inventory instead of Attachment 2 that requires appraisal by Probate Referee. Question whether personal property was appraised? **Need** verified supplement.
3. Accounting period 12/02/17 to 01/30/18.
4. Assets on Hand \$282,000 consisting of real and personal property.
5. Petitioner waives statutory compensation.
6. Attorney requests statutory fees of \$8,640.00. Calculated. Question how counsel proposed to be compensated as there are no liquid assets? Court to inquire.
7. Petitioner requests he be authorized to pay attorney's statutory feed from fees deposited by petitioner and held in the attorney's client trust account. **Need** further clarification via verified supplement.
8. **Need** verified supplement that includes the character of the property (ie. sole and separate).
9. **Need** verified supplement that includes the address of heir receiving real property.
10. Petition identifies Petitioner as Executor and states Decedent left a Trust leaving all his property to his 3 issue. However, Petitioner was appointed as

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.**

Administrator as there is no will. **Need** further clarification via verified supplement.

11. Ruben and Alfonso Gonzalez, Jr. have assigned their interests in favor of Martha Elvira Gonzalez.

12. No proposed order. Submit Order after Hearing.

RECOMMENDATION

Need to clear notes 2, 7-10 then Court's discretion. If approved, set next hearing for final discharge on **04/02/19**.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 10

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 04/03/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800156

CASE NAME: MTR OF JAMES JAY SCHAUER

HEARING:

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

COUNSEL:

JAMES JAY SCHAUER

(DEC)...

STEVEN COPELAN

(PET)...CRAIG M PARKER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary w/WA and full authority under IAEA by Steven Copelan ["Petitioner"].

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

1. Named Executors; surviving spouse; and beneficiaries decline to act and nominate Petitioner.
2. Will does not waive bond as this petitioner. However, all beneficiaries waive bond. Estimated estate valued at \$206,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
3. ~Proposed Form Order/Letters 02/20/18.

RECOMMENDATION:

Court's discretion re: bond. If approved, set future hearing for Accounting Review on **06/11/19**. 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

Page: 11

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 04/03/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800164

CASE NAME: FRANK WILSON

HEARING:

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

COUNSEL:

FRANK WILSON

(DEC)...

TRACY PUTNAM

(PET)...GAUDY LAW, INC

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by son-in-law, Tracy Putnam ["Petitioner"].

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

1. Declination and Nomination of this Petitioner filed by Decedents issues/heirs.
2. Heirs waive bond. Estimated estate valued at \$464,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). JTD.
3. Proof of publication filed.
4. ~Proposed Form Order/Letters 02/21/18.

RECOMMENDATION:

Court's discretion re: bond. If approved, set future hearing for Accounting Review on **06/11/19**. 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

Page: 12

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 04/03/18 TIME: 8:30 DEPT: S36P

CASE#: SC SS01006

CASE NAME: IN THE MATTER OF SCOTT J ROBINSON

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MARGIE NEAL	(CPE)...PRO/PER
REGENA L GRAVELY	(CPE)...PRO/PER
SCOTT J ROBINSON	(CEP)...PRO/PER
SCOTT J ROBINSON	(PLA)...PRO/PER

XREF: SCSS8402 (Phillip A Bower) **heard in S35P on 04/03/18**

GENERAL INFORMATION:

Order Appointing Margie L. Neal, Conservator of the Person and Estate entered 01/09/89 in Shasta County. Order Granting Petition to Transfer to San Bernardino County entered 04/07/97.

THIS CASE IS SET FOR HEARING ON Petition for Successor Conservatorship, person and estate by Regena L. Gravelly [friend], nominee by current Conservator of the person and estate, Margie L. Neal ["Petitioner"].

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

1. There is currently no vacancy. **Need** resignation by current conservator and petitioner, Margie L. Neal per Pr. C. § 2660.
2. Conservatee appears to receive only income from SSI. Question the need for estate powers? Court to inquire.
3. Petitioner requests no bond be required as conservatee receives only SSI and requiring bond would be a hardship. JTD.
4. Section 4a to petition re: whether proposed conservatee is or is not a patient in or on leave of absence from a state institution is incomplete. **Need** verified supplement.
5. Petitioner requests Pr. C. §2590 powers to operate, at the risk of the estate a business, farm, or enterprise constituting an asset of the estate and the power to pay, collect, compromise, or otherwise adjust claims, debts or demands upon the guardianship or conservatorship.

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. Proposed conservatee is developmentally disabled. **Need** appointment of counsel and report by same.
7. Medical Capacity Declaration filed.
8. List of Required Contacts does not include conservatee's mother, C.J. Van Dyck. **Need** same.
9. Court Investigator Report filed.
10. This petition is for general, and not limited, conservatorship. An IRC report is therefore optional per Pr.C. 1827.5(b). Does court wish to require? JTD.
11. Certificate of Completion re Conservatorship Class filed.
12. Notice does not include mother, C.J. Van Dyck. **Need** proper service.
 - a. Petitioner requests an Order Dispensing with Notice as to father, Michael Robinson, whose whereabouts are unknown and for which mother has not had contact with since 1977. JTD.
13. ~Proposed Form Order/Letters 02/20/18.

RECOMMENDATION:

Court to appoint counsel, need to clear notes 1, 4, 6, 8 & 12 then Court's discretion. If approved, set hearing for Compliance Review for **11/06/18** 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.

Set Accounting Review hearing (as to Margie Neal) in **60 days** beginning 07/01/17 per Local Rule 20-1406 and Pr. C. §2620.

If estate powers are granted as to Successor, set Accounting Review hearing for **06/11/19**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.

(nb)

Future Hearing
09/06/18 Accounting Review re Margie Neal

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

DATE: 04/03/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1400242

CASE NAME: Ida Sybrandy

HEARING:

Accounting Review by ***

COUNSEL:

IDA SYBRANDY	(CEP)...PRO/PER
IDA SYBRANDY	(OBJ)...WILLIAM M NASSAR &
JOANNA AVERETT	(CE)...MAUREEN MURATORE
SIDNEY SYBRANDY	(PET)...THOMPSON & COLEGATE
W.A. HLA VATY	(PCR)...PRO/PER

XREF: PROPS1400701 (Simon Sybrandy Family Trust)

GENERAL INFORMATION

Continued from 02/08/18 at request of counsel. Parties are working on a global settlement.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 1st Account re conservatorship for Joanna Averett, approved on 02/02/17.
 - a. Order signed 04/11/17 states **account current**, however, it appears this was a **final account** for conservatorship in which assets were to be transferred to the trust.
 - b. Court to clarify if a final discharge for conservatorship should be set.
 - c. Order appears to state the Trust accounting shall be filed in PROPS1400701; accounting review set 04/25/18.

RECOMMENDATION

Court to clarify accounting review/order issue. Set final discharge re conservatorship in **60** days. If continued, set on a Thursday calendar as originally set.

(lc/nb)

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

DATE: 04/03/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500228

CASE NAME: CHARLOTTE K KNIGHT-UTTER

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of LINDA K GUYETTE

COUNSEL:

CARY KNIGHT	(FRANK O TETLEY
CHARLOTTE K KNIGHT-UTTER	(CEE)...E JOAN NELMS
DONNASUE ORTIZ	(CP)...DONNASUE ORTIZ
E JOAN NELMS	(PET)...E. JOAN NELMS
LINDA K GUYETTE	(PET)...MICHAEL C. MADDUX
WRETHA KNIGHT	(PET)...FRANK O TETLEY

GENERAL INFORMATION

Linda Guyette appointed conservatorship of the person and Donnasue Ortiz appointed conservatorship of the estate on 12/14/17, no bond.

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

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

1. Need Order and Letters as to conservator of the person, Linda Guyette.
2. Need proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's Rights per Pr.C.§1830(c).
3. Need Statement of Care Plan in accord with Pr.C.§2352.5.
4. Need a 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. If the conservatorship estate holds interest in real property, need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313.

RECOMMENDATION:

Inquire status.

(nb)

Future Hearing:

03/06/19 Accounting Review.

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

Superior Court of Calif, County of San Bernardino

Page: 15

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

DATE: 04/03/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500276

CASE NAME: MTR OF JUNE N ROBINSON

HEARING:

Second and final Account and Report of WESLEY A ROBINSON and
Petition for allowance of fees filed.

COUNSEL:

ANGELA M PARR	(CEP)...CHRISTOPHER E OVERGAARD
CECILIA E ROBINSON	(CPE)...CHRISTOPHER E OVERGAARD
JAMES B. CHURCH	(PET)...JAMES B CHURCH & ASSOCIATES
JUNE N ROBINSON	(CEP)...PRO/PER
JUNE ROBINSON	(CEP)...JAMES B CHURCH & ASSOCIATES
WESLEY A ROBINSON	(CPE)...CHRISTOPHER E OVERGAARD

XREF: PROPS1700745 (June N Robinson)

GENERAL INFORMATION:

Continued from 11/28/16 and 02/21/18 for review of supplements.

THIS CASE IS SET FOR HEARING ON Second and Final Account and Petition for Fees by Cecilia E. Robinson [Executor of Estate of Wesley Robinson, prior conservator]

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

1. Wesley A. Robinson was appointed conservator for his wife, June Robinson, on 07/02/12; however, Wesley A. Robinson died on 06/11/17; conservatee, June Robinson, subsequently died on 07/19/17.
2. Cecilia E. Robinson was appointed Executor of the Estate of Wesley Robinson. Cecilia and Angela Parr were appointed Co-Administrators of the Estate of June Robinson.
3. Conservator Wesley and Conservatee June owned community property including several parcels of real property in which title was held as joint tenancy. Upon Conservator's passing, the real property became Conservatee's sole and separate property; thus, they became assets of the conservatorship estate.
Supplemental final Inventory and Appraisal affixed [supp. 2/13/18-LF, pgs. 7-11] includes properties that passed to Conservatee upon husband Wesley's passing 38 days prior to Conservatee's death. Petition indicates

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.

values were appraised as of Conservatee's death and request that the Court waive an Inventory and Appraisal for 06/11/17 (date of Wesley's demise). Waivers affixed [supp. 2/13/18, LF, pgs. 13-14]. JTD.

4. Pre-death assets on hand **\$1,466,613.38** of which \$3,343.86 is cash and remaining is real property.
5. Post-death accounting period: 07/20/17 to 09/08/17.
6. Post-death assets on Hand: **\$1,466,612.38**
7. Petitioners waive compensation.
8. Attorney requests compensation totaling **\$9,975** for 26.6 hours at \$375/hour for attorney services. Itemized. [Acct, 01/09/18, LFpgs36-39] to be paid from the Estate of June Robinson. **JTD**
9. Attorney requests reimbursement of costs advanced totaling **\$1,189.50**. Itemized. [Acct, 01/09/18, LFpg40].
10. Petitioners request an order that the remaining conservatorship estate, including Bank of America Account No. XXX5221, be distributed to Petitioners as Administrators of Conservatee's Estate (related matter). **JTD.**
11. Petitioner requests exoneration of \$48,000 bond upon receipts. However, bond may not be exonerated until filing of receipts and entry of final discharge.
12. Notice given.
13. No proposed Order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion. If approved, Court to set hearing re receipts and final discharge for **04/10/19**.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 16

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 04/03/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600134

CASE NAME: MTR OF EVELYN RUTH GEORGE

HEARING:

Accounting Review by ***

COUNSEL:

EVELYN RUTH GEORGE	(CEP)...PRO/PER
PATRICIA LYNN RAMSEY	(CE)...JACK B. OSBORN
PATRICIA LYNN RAMSEY	(CPE)...JACK B. OSBORN

XREF: PROPS1600544 (Evelyn R George revocable living trust)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review by Conservator of the Person and Estate, Patricia L. Ramsey (daughter).

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

1. Conservator appointed on 12/13/16, \$20,000 bond.
2. Final inventory includes a copy of bank account statement. However, account is not properly vested. Need same per Local Rule 20-1403.
3. Ex Parte Petition to Dispense with Accounting and Order received and forwarded for review.

RECOMMENDATION:

Need to clear note 2.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 17

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

DATE: 04/03/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600284

CASE NAME: MTR OF JANICE ANNE PRAMSCHUFER

HEARING:

First & Final Account and Report of ANDREW PRAMSCHUFER, SUSAN PRAMSCHUFER and Petition for allowance of fees filed.

COUNSEL:

ANDREW PRAMSCHUFER	(CPE)...ROSA M MARQUEZ
BARBARA PRAMSCHUFER	(MITCHELL I ROTH
JANICE ANNE PRAMSCHUFER	(CEP)...DONNASUE ORTIZ
LIBERTY MUTUAL INSURANCE	(TP)...
SUSAN PRAMSCHUFER	(CPE)...PRO/PER
SUSAN PRAMSCHUFER	(PET)... ROSA M. MARQUEZ

Request for Waiver of Court Fees and Costs filed by JANICE ANNE PRAMSCHUFER is GRANTED

Fee waiver amount due \$961.00

\$465.00 for petition for conservatorship on 09/21/16

\$465.00 for first account and report on 03/15/17

\$31.00 for fax fees

XREF: CONPS1600244 (Barbara Pramschufer)

FAMSS1706884 (Barbara Pramschufer-n-Tony Hameed Ullah)

CIFDS1700057 (Pramschufer vs Ullah)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Conservators of the Person and Estate, Andrew Pramschufer and Susan Pramschufer ["Petitioners"-siblings].

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

1. Accounting period 02/13/17 to **03/21/18**.
2. Assets on Hand **\$6,474.61** consisting of cash.
3. Petitioners do not request compensation.
4. Petitioners request reimbursement in the sum of **\$3,770.56** for payments to attorney for services to the estate. Billed at \$150-\$250 for attorney time. Itemized [Acct., LF, pgs. 7-15]. JTD.
 - a. Fees have been paid prior to obtaining court authority.

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. Fees include costs that are normally considered overhead.
5. Accounting does not include proposed distribution. **Supp. (03/27/18) alleges if the court approves the Conservator's petition for reimbursement, the estate will have expended all Conservatee's assets and the estate will be ready to be terminated.**
 6. **Need** residential facility statements and/or written verification of rent per Pr.C. §2620(c)(5) for LMB Home Care and Salem Christian Homes.
 7. During the accounting period, petitioner paid Angel Care for caregiver services. **Need** verified declaration for acknowledgment of receipt of fees per Local Rule 20-1406(c).
 8. **Need** copies of investment/bank statements to support cash balances on hand per Local Rule 20-908.
 9. **Need** Notice of Hearing with proof of service to include Donnasue Ortiz and Mitchel I. Roth.
 10. **Supp. (03/27/18) does not affix Exhibit A consisting of updated bank statement and receipt as alleged. Need same via verified supplement.**
 11. No proposed order. Submit Order after Hearing.

RECOMMENDATION: Trail to 04/16/18

Need to clear notes then Court's discretion. If approved, set next hearing for receipts and final discharge on **04/09/19**.

(nb)

Future Hearing:

04/16/18 Hearing re: petition to terminate conservatorship etc.

04/16/18 Petition(Second) for attorney's fees and for etc.

Superior Court of Calif, County of San Bernardino
Page: 17A ADD ON
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 04/03/18 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.

Continued from 03/27/18 at request of counsel. Possible conservatorship in Riverside County.

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

Page: 18

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 04/03/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800050

CASE NAME: MTR OF FELIZ ARGRIPIA CONTRERAS GOMEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CARLA GUADALUPE GOMEZ (CP)...PRO/PER

FELIZ ARGRIPIA CONTRERAS GOME (CTP)...

MARY M GOMEZ (CP)...PRO/PER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of the person, by mother, Mary M. Gomez and sister, Carla G. Gomez ["Petitioners"].

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

- 1 No bond – person only.
- 2 Section 6a to petitioner [LF, p. 7] indicates the proposed conservatee's spouse is not a party to any actions or proceeding against the proposed conservatee. Court to inquire whether proposed conservatee is married?
- 3 Petitioner seeks medical powers. Section 7 to Medical Capacity Declaration is not initialed and Section 8 is blank. **Need** complete capacity declaration.
- 4 Proposed Conservatee is developmentally disabled. **Need** appointment of counsel and report by same.
- 5 Court Investigator's Report filed.
- 6 Citation returned served.
- 7 **Need** Proof of Completion re Conservatorship Class.
- 8 **Need** Notice of Hearing with proof of service.
 - a. Petitioner requests an Order Dispensing with notice as to father (unnamed); alleges he abandoned proposed conservatee at birth; and has never had any involvement in her life. JTD.
- 9 This petition is for general, and not limited, conservatorship. An IRC report is therefore optional per Pr.C. 1827.5(b). Does court wish to require? JTD.
- 10 ~Proposed Form Order/Letters 02/27/18.

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; need to clear notes 3-4 & 7-8 then Court's discretion. If approved, set hearing for Compliance Review for **11/06/18** 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

Page: 19

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 04/03/18 TIME: 9:30 DEPT: S36P

CASE#: RC RS00134

CASE NAME: ISRAEL D MORENO

HEARING:

Third Account and Report of ISRAEL F MORENO, ISRAEL F MORENO, ELIZABETH MORENO, ELIZABETH MORENO and Petition for allowance of fees filed.

COUNSEL:

AMERICAN CONTRACTORS INDEMNITY (PET)...PRO/PER	
ELIZABETH MORENO	(CPE)...VOORHEES & RATZLAFF
ELIZABETH MORENO	(PET)...BROCK LAW OFFICE
ELIZABETH MORENO	(PET)...BROCK, MARTIN &
ISRAEL D MORENO	(CEP)...ALTHOUSE & MCDONOUGH
ISRAEL F MORENO	(PET)...BROCK LAW OFFICE
ISRAEL F MORENO	(PET)...VOORHEES & RATZLAFF

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Third Account Current; Continued Monthly Allowance; Decrease in Bond; and Petition for Fees by Conservators of the Person and Estate, Israel F. Moreno and Elizabeth Moreno ["Petitioners"-parents].

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

1. Account period 05/01/15 to 05/31/17 (2 years).
2. Assets on hand \$1,194,533.18 consisting \$454,505.54 in cash and \$740,027.64 in real and personal property.
3. Current bond of \$679,969.00. Appears sufficient.
4. Petitioners request compensation of \$4,500 for services. Conservators allege they provide 24 hour care and assistance with all of conservatee's basic needs. JTD.
5. Co-Conservators request the court authorize continued monthly allowance of \$4,100.00 for Conservatee's needs and living expenses. JTD.
6. Attorney requests fees of \$7,803.50 for period 01/05/16 to 04/05/18. Billed at \$250-\$325/hour for attorney time and \$65 -\$115 paralegal time totaling 53.20 hours.' Itemized [Acct., LF, pgs. 37- 39]. JTD.

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

7. Petitioner enlisted the services of Reiss, Jackson & Company to prepare the accounting whose services are billed for the sum of \$5,238.00 [Acct., LF, p. 16]. Does Court wish to reduce counsel's fees by this amount? JTD.
8. Last Court Investigator report filed 01/18/18.
9. No proposed order. Submit Order after Hearing.

RECOMMENDATION

Court's discretion re: fees and bond. If approved, Court to set the next hearing re Accounting Review for biennial Accounting Review for **07/30/19** or an annual accounting for **07/31/18** per Pr.C.§2620(a). 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

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 04/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO DS1000091

CASE NAME: JOANNA B HUNT

HEARING:

Hearing Re: ACCOUNTING REVIEW

COUNSEL:

DAVID BROWN	()...
DEPT. OF HEALTH CARE SERVICES	(PRO/PER	
JEANNE E KENNEDY	(JEANNE E KENNEDY	
JOANNA B HUNT	(DEC)...	
JOHN HUNT	(PET)...PRO/PER	
KATHY HUNT	(PRO/PER	
ROBERT HUNT	(PET)...	
VICTIM COMPENSATION AND GOVERN	(PRO/PER	
XAVIER FRANCO	(OBJ)...PRO/PER	
XAVIER FRANK FRANCO	(PET)...PRO/PER	

GENERAL INFORMATION

Continued from **5/7/14, 6/18/14** (no appearance) and **8/20/14** for Mr. Hunt to retain counsel. On 5/7/14, John Hunt is ordered to consult with probate referee and advised to speak with counsel. Court orders no property to be sold or disposed of at this time.

Continued from 09/24/14, 12/11/14, 3/13/15, 5/29/15 and 06/08/15.

Matter reset by court when it was discovered there was no accounting or discharge.

Continued from **04/12/17**. John Hunt to file change of address. Xavier Franco ordered to allow parties into home to inventory contents and not disturb Xavier's belongings.

Inventory and Appraisal and accounting to be filed 30 days prior to hearing.

Continued from 07/19/17. Parties to contact Probate Referee to conduct and appraisal. Accounting must be filed 30 days before date of hearing on 11/15/17.

Continued from 11/15/17 and 01/17/18. Court orders powers of John Hunt suspended. Matter referred to Public Administrator.

THIS CASE IS SET FOR HEARING ON 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.**

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

1. Letters of Administration issued to John Hunt, son, on 07/10/12; full authority no bond.
2. At hearing on 2/13/14, the Court orders John Hunt to prepare and provide accounting from date of appointment to present date to the court.
3. It is unclear whether the 06/08/15 Trial granted part of the property through the Petition to Determine Succession or the Probate Administration. **Need order after trial re-submitted with corrections.**
4. Supplemental Inventory and Appraisal filed 02/08/12; however, **need** final Inventory and Appraisal.
5. **Need** accounting.

RECOMMENDATION:

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

(gls/vet/gls/lc/lh/nb)

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

DATE: 04/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400199

CASE NAME: Kenneth Wayne Horne

HEARING:

Accounting Review by ***

COUNSEL:

KENNETH WAYNE HORNE (DEC)...
MARCUS RAY JONES (PET)...E. LAWRENCE BROCK

GENERAL INFORMATION

Continued from 10/03/17 and 12/05/17 at request of counsel. Counsel reports her client is not participating and denies probate has been opened. Counsel will be filing a motion to be relieved. Marcus Jones is cited to appear at the next hearing. Should he fail to appear a bench warrant may be issued for his arrest. Citation issued to: Marcus Ray Jones who is cited and required to appear on 03/05/18. Notice by Judicial Assistant.

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 Marcus Ray Jones, step-grandson, on 04/29/14; full authority, no bond.
2. Order on First Report of Status entered on 11/12/15.
3. Final Inventory and Appraisal filed 08/31/15.
4. **Need** accounting or status report.
5. **Need** return of Citation.

RECOMMENDATION

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

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 04/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500057

CASE NAME: John Journey Jackowski, Jr.

HEARING:

First and final Account and Report of JACKLINE JOURNEY SEGUERRA
and Petition for allowance of fees filed.

COUNSEL:

JACKLINE JOURNEY SEGUERRA (PET)... HOWARD S BORENST
JOHN JOURNEY JACKOWSKI jr (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of
Account and for Fees by Executrix, Jackline J. Seguerria ["Petitioner-sister].

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

1. Sole beneficiary waives accounting.
2. Assets on Hand \$541,866.34 in cash.
3. Petitioner waives compensation.
4. Attorney requests statutory fees of \$13,837.00. Calculated.
5. Attorney requests reimbursement of costs advanced of \$1,190.50. Itemized.
6. Need statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary per Pr. C. § 1064 (a)(4). Need verified supplement.
7. Need verified supplement indicating if cash has been invested and maintained in an interest bearing account per Pr.C.§ 1064(a)(5).
8. Proposed Order 01/24/18 does not include findings re: sole and separate property.

RECOMMENDATION:

Need to clear notes 6-7 then Court's discretion. If approved, set next hearing for final discharge on **04/09/19**.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 04/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500709

CASE NAME: MARY P. WILLIAM AKA PAT WILLIAMS

HEARING:

Probate status report filed.

COUNSEL:

MARY P. WILLIAM (DEC)...
NOAH WILLIAMS (PET)...ROBBINS & HOLDAWAY

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report (filed 01/19/18) by
Administrator, Noah Williams ["Petitioner"].

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

1. Petitioner alleges the estate is not in a condition to be closed as sole asset of the estate, the real property, was listed for sale and is currently in escrow.
2. Petitioner requests an additional 12 months to close the estate.
3. ~Proposed Order 01/19/18.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **04/09/18**.
(nb)

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 04/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1501187

CASE NAME: MTR OF MARY HELEN RAMIREZ

HEARING:

First and Final Account and Report of ROBERT RICK RAMIREZ and
Petition for allowance of fees filed.

COUNSEL:

MARY HELEN RAMIREZ (DEC)...
ROBERT RICK RAMIREZ (PET)...DIANE E ROBBINS

GENERAL INFORMATION:

Continued from **09/19/17** at request of counsel for objection to be filed/meet and confer.

Continued from 11/21/17 for an amended accounting to be filed, including monies that were conceded to state. Notice to be given by Ms. Robbins.

THIS CASE IS SET FOR HEARING ON First and Final Report and Petition for Fees by Administrator, Robert. E. Ramirez ["Petitioner"- son].

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

1. Accounting period 07/12/15 to 06/30/17.
2. Assets on Hand \$701,223.39 consisting of \$667,806.02 cash and remaining in receivables from Sandra Gonzales.
3. Statutory compensation of \$18,115.46 requested. Calculated.
4. Attorney requests extraordinary fees of \$3,430.00 for services rendered in connection with the sale of real property and unlawful detainer proceedings. Billed at \$350/hour for a total of 9.80 hours' attorney time. Generally described. Need itemization per CRC 7.702 indicating the specific amount requested for each category of service via verified supplement.
5. Petitioner requests reimbursement of costs advanced of \$12,816.73. Itemized [LF, pgs. 28-30].
6. Attorney requests reimbursement of costs advanced of \$2,744.00. Itemized [LF, p13].
7. Petitioner requests authority to withhold \$30,000 as a reserve for unpaid income taxes and bond premium. 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.**

8. Petitioner states receivables in the amount of \$33,417.37 are owed by daughter, Sandra Gonzales for unlawful detainer proceedings; unpaid rents; and removal of personal property. Petition indicates Sandra's distribution will be reduced by this amount.
9. **Objection to first and final account filed by Sandra Gonzales.**
10. Proposed Order 06/30/17 reflects a different amount for cash on hand and does not include omnibus clause.

RECOMMENDATION: Matter is contested.

Need to clear note 4 then Court's discretion. If approved, set next hearing for receipts and final discharge for **04/09/19**.

(nb)

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

DATE: 04/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600079

CASE NAME: ESTATE OF WALTER L BUDD AMMONS

HEARING:

Hearing re Final Discharge

COUNSEL:

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

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge of Public Administrator.

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

1. Order Settling First and Final Report of Special Administrator entered 03/28/17.
2. Need receipt by Co-Administrators, Larry Ammons and Krista Wagner.
3. Need Ex-Parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 04/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600259

CASE NAME: KATHERYN M PIERCE

HEARING:

First and final Account and Report of DAWN PIERCE and Petition
for allowance of fees filed.

COUNSEL:

DAWN PIERCE (PET)...PECCORINI & PECCORINI
KATHERYN M PIERCE (DEC)...

X-REF PROPS 1500889 *Richard Pierce-son*

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees
by Administrator, Dawn Pierce ["Petitioner"-granddaughter

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

1. Accounting period 05/17/16 to 11/30/17. However, start date should be decedent's date of death on 01/28/00.
2. Assets on Hand \$105,642.72 consisting of cash.
3. Statutory fees of \$4,600 requested. Calculated.
4. Petitioner requests authority to withhold the sum of \$1,000 as a reserve.
5. Need statement regarding notice to Franchise Tax Board or notice per Pr. C. § 9202(c)(1).
6. Need statement regarding notice to California Victim and Compensation and Government Claims Board or notice per Pr. C. § 9202(b).
7. Need statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary per Pr. C. § 1064 (a)(4). Need verified supplement.
8. Discharge will not occur until entry of a final discharge order.
Proposed Order 01/18/18 does not include balance and description of the assets on hand, specifically noting the amount of cash included in said balance per Local Rule 20-614(c); findings re sole and separate property; indicate the requirement of an accounting is not required; and discharges upon filing of receipts instead of upon entry of a 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.**

RECOMMENDATION:

Need to clear notes 5-7 then Court's discretion. If approved, set next hearing for receipts and final discharge for **04/09/19**.

(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

Page: 8

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

DATE: 04/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600427

CASE NAME: MTR OF ROBERT CARL STINDT

HEARING:

Accounting Review by ***

COUNSEL:

ANDREA STINDT (PET)...MARK H MCGUIRE
ROBERT CARL STINDT (DEC)...

GENERAL INFORMATION

Continued from 01/17/18 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review re Andrea Stindt,
administrator

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

1. Letters of Administration with Will Annexed issued to Andrea Stindt with full authority and no bond on 11/09/16.
2. **Need** final Inventory and Appraisal with supporting financial statements per Local Rule 20-908.
3. No accounting or status report of administration. Need same.

RECOMMENDATION

Inquire status.

(lh/nb)

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

DATE: 04/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600547

CASE NAME: LINDA S EDMONDSON

SEE ALSO 10

HEARING:

Petition for suspension of powers & removal of personal representative

COUNSEL:

BRENDA S GARCIA	(PET)...J. TERRENCE MOYNIHAN
LINDA S EDMONDSON	(DEC)...
TERRI A. TURNER	(PET)...DAVID LIVINGSTONE TAUB, ESQ

GENERAL INFORMATION:

Continued from 12/05/17. The Court orders that the petition be verified. Mr. Taub reports a petition for successor executor may be filed. Parties scheduled for settlement discussions.

THIS CASE IS SET FOR HEARING ON Petition for Suspension of Powers and Removal of Personal Representative by Terri A. Turner ["Petitioner"].

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

- 1 Petitioner is a beneficiary to the estate and the sister of the Executrix, Brenda S. Garcia ["Brenda"]. Petitioner alleges the personal representative has committed acts of waste on the Bloomington residence; has committed acts of mismanagement on the estate; and is incapable of properly executing the duties of the office or is otherwise not qualified for appointment as personal representative. Additionally, petitioner claims Brenda owes the IRS about \$10,000 to \$30,000 in taxes for the inheritance she withdrew.
- 2 Petitioner claims removal of Brenda is necessary for the protection of the estate; beneficiaries; and because Brenda is abusing her status as Executrix by allowing herself and others to live on the residence without paying the estate fair rental value and rent-free for the last 14 months. Petitioner alleges this activity suggests self-dealing and a conflict of interest in the executor's duty to close the estate.
- 3 Petitioner request the Court to issue a citation directed to Brenda S. Garcia requiring her to appear and show cause why she should not be removed and

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.

- her letters revoked; for Court to remove and revoke the Testamentary Letters; and for the Court to suspend the powers of Brenda S. Garcia, forthwith, pending investigation of the charges made against her.
- 4 Declaration of Terri A. Turner in support of petition filed, separately.
 - 5 Petition includes a request for the Court to consider the pending Petition of Administration of the Will, filed by Petitioner; however, review of this file does not indicate a Petition for Appointment of a Successor Personal Representative has been filed.
 - 6 Petition is not verified. Need same.
 - 7 Need Notice of Hearing with proof of service.
 - 8 No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 6-7 then Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 10

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 04/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600547

CASE NAME: LINDA S EDMONDSON

SEE ALSO 9

HEARING:

Accounting Review by ***

COUNSEL:

BRENDA S GARCIA

(PET)...J. TERRENCE MOYNIHAN

LINDA S EDMONDSON

(DEC)...

TERRI A. TURNER

(PET)...DAVID LIVINGSTONE TAUB, ESQ

GENERAL INFORMATION

Continued from **10/16/17** to be heard with petition set same date. Notice given by Mr. Taub.

Continued from 12/05/17 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 Brenda Garcia, daughter, on 09/08/16; full authority, no bond.
2. Final Inventory and Appraisal filed.
3. Need accounting or status report.

RECOMMENDATION

Inquire status of accounting.

(ww/nb)

Superior Court of Calif, County of San Bernardino

Page: 11

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 04/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600749

CASE NAME: PATRICK E FERREE

HEARING:

First and Final Account and Report of CASSANDRA L FERREE and
Petition for allowance of fees filed.

COUNSEL:

CASSANDRA L FERREE	(PET)...WILLIAM J BRUNICK
FERREE MINORS	(MIN)...PRO/PER
PATRICK E FERREE	(DEC)...

X-REF: FAMVS 1601202 *disso w/children-dismissed*

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees
by Administrator, Cassandra L. Ferree ["Petitioner"-spouse].

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

1. Accounting period 05/22/16 to 11/30/17.
2. Assets on Hand \$220,000 consisting of real property.
3. Petitioner waives compensation.
4. Attorney requests statutory fees of \$7,602.11. Calculated.
5. Attorney requests reimbursement of costs advanced of \$1,526.00. Itemized.
6. Need address(s) of heirs receiving real property.
7. Need statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary per Pr. C. § 1064 (a)(4). Need verified supplement.
8. Report by GAL, Jeanne E. Kennedy, filed 12/21/16.
9. Petitioner alleges the estate consists entirely of the community property of the decedent and Petitioner, his spouse. Petitioner further alleges that all property was acquired during their marriage; was acquired from the community earnings of both of them; even though the decedent always took title in his own name as his sole and separate property
10. Petitioner requests that the assets of the estate be distributed to her as the surviving spouse per Pr. C. §6401. However, petitioner would only be entitled to 1/3rd of the estate under Pr. C. §6401 as decedent was survived by 2 issue.

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.**

Need verified supplement that includes authority that would allow this Court to distribute 100% of the estate to Petitioner when parties were in the middle of divorce proceedings.

11. Notice does not include parents Mark Ferree and Jeani Dupuis or siblings, Kyle, Jacob, Jerrell, Jesse, Sarah and Katelyn who were not included in the petition or ever noticed. Need proper service.
12. **Objections filed by GAL, Jeanne E. Kennedy, on behalf of minors.**
13. **Response to Objections by Cassandra L. Ferree filed.**
14. Proposed Order 01/19/18 erroneously indicates petitioner has full powers; and distributes estate and y other unknown or discovered property to petitioner, only.

RECOMMENDATION:

Need to clear notes then set for contested hearing.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 12

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

DATE: 04/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600979

CASE NAME: MTR OF DENNIS R MCDERMOTT

HEARING:

PETITION UPON WAIVER OF Account and Report of ELIZABETH M
SCHWANEBERG and Petition for allowance of fees filed.

COUNSEL:

DENNIS R MCDERMOTT (DEC)...
ELIZABETH M SCHWANEBERG (PET)...KENNETH E DEVORE &

GENERAL INFORMATION:

Continued from 01/17/18 on courts motion.

THIS CASE IS SET FOR HEARING ON PETITION UPON WAIVER OF Account and
Report of ELIZABETH M SCHWANEBERG and Petition for allowance of fees

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

1. Assets on hand: \$475,703.01, consisting of \$95,088.87 in cash and remaining in real property, stock, and a vehicle.
2. Petitioner waives compensation.
3. Attorney requests statutory fees of \$12,514.06. Calculated.
4. Notice was given.
5. ~Proposed order: 09/22/17

RECOMMENDATION:

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

(lh/nb)

Superior Court of Calif, County of San Bernardino

Page: 13

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

DATE: 04/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700160

CASE NAME: MTR OF DEBRA JACKSON SYLVESTER

HEARING:

Petition for AN ORDER TO CONFIRM VALIDITY OF TRUST CONFIRM
TRUSTEE AND CONFIRM ASSETS TO REVOCABLE TR

COUNSEL:

CALIFORNIA PUBLIC EMPLOYEE'S R	(TP)...CALIFORNIA PUBLIC
DEBRA JACKSON SYLVESTER	(DEC)...
DELONZA SYLVESTER	(PET)...PRO/PER
RHONDA ANTHONY	(PET)...PRO/PER
SBCO PUBLIC ADMINISTRATOR	(SA)...CRAIG M PARKER
WHARLEST I.S. JACKSON	(PET)...JASON L GAUDY

Request for Waiver of Court Fees and Costs filed by RHONDA ANTHONY is GRANTED

X-REF: PROPS 1701258

Currently under review by Legal Research.
(LR)

Notice:

Need Notice of Hearing with proof of service to include beneficiaries Nikita N. Jackson; Rhonda N. Jackson; David Ford; Jeremy Vanison, Cheryl D. Scott; Diedre Townsend; Stella Bland; and Delonza Sylvester.

(nb)

Future Hearing:

07/18/18 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

Page: 14

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 04/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700477

CASE NAME: Benjamin B Banaag

HEARING:

Petition for Determination Of Entitlement To Estate Distribution

COUNSEL:

BENJAMIN B BANAAG

(DEC)...

SHIRLEY B. WEIS

(PET)...T W RONALD DANIERI

Currently under review by Legal Research.
(LR)

Notice given.
(nb)

Future Hearing:
10/11/18 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

Page: 15

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

TRUSTS AND MOTIONS

DATE: 04/03/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1701258

CASE NAME: The Reverend Od Vanision and Exerlena Vanison Fami

HEARING:

Petition for ord to conf valid of tru conf trustee;and to conf assets to rev tru

COUNSEL:

RHONDA ANTHONY (PET)...PRO/PER
THE REVERENDOD VANISION AND EX (TRU)...

Request for Waiver of Court Fees and Costs filed by RHONDA ANTHONY is GRANTED

Currently under review by Legal Research.
(LR)

Notice:

Need Notice of Hearing with proof of service to Petitioner/Beneficiary Rhonda Anthony in her individual capacity; former beneficiaries, Delonza Sylvester; David Ford, Cheryl Denise Scott; Diedra Townsend; Jeremy Vanison; and beneficiary Nikita Nichelle Jackson.

Objections filed by Public Administrator. Matter is contested.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 15A

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 04/03/18 TIME: 8:35 DEPT: S37P

CASE#: TRU PS1800039

CASE NAME: 1998 ROBERT BRUCE OGILVIE SR AND OPAL LEILA

HEARING:

Petition for Removal of Successor Trustee Gregory Wiebe:
Delivery of Trust Assets

COUNSEL:

RICHARD OGILVIE

(PET)...BENNETT KERNS, ESQ

THE 1998 ROBERT BRUCE OGILVIE

(TRU)...

Currently under review by Legal Research.
(LR)

Notice:

Notice of Hearing filed 03/13/18 does not include Richard Ogilvie and Jonathon Ogilvie or give 30 days' notice. Need proper notice and service.
(nb)

Superior Court of Calif, County of San Bernardino

Page: 16

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIP

DATE: 04/03/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS0700070

CASE NAME: ABRAHAM ISAAC ARRIOLA

HEARING:

Hearing Re: POSS REMOVAL OF CO-CONSERVATOR

COUNSEL:

ABRAHAM ISAAC ARRIOLA	(CEE)...JEANNE E KENNEDY
FAITH MICHELLE ARRIOLA	(CP)...PRO/PER
RAMONA D MASHTALIER	(CP)...JANET M HERRING
WILLIAM B MASTALIER	(CP)...PRO/PER

GENERAL INFORMATION:

Continued from 01/23/18 on courts motion to locate William Mastalier and give him notice. The Court temporarily suspends conservator powers of William Mastalier (father).

THIS CASE IS SET FOR HEARING ON Possible Removal of Co-Conservator

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

1. Matter set at 12/08/17 hearing, wherein, The Court having reviewed the Court Investigator report filed 11/22/17; orders counsel to be appointed; and matter placed on calendar on the issue of the possible removal of co-conservator, William Mastalier.
2. Attorney Jeanne E. Kennedy appointed. **Report filed.**
3. Notice by Judicial Assistant.

RECOMMENDATION:

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino
Page: 17
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 04/03/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS0900167

CASE NAME: MARK JORDAN ELKINS

SEE ALSO 24

HEARING:
Petition for Attorney's Fees

COUNSEL:

CALIFORNIA DEPARTMENT OF STATE	(PET)...PRO/PER
DENNIS SHOGREN	(CEP)...JAMES B CHURCH
KERINE E ELKINS	(CPE)...NOREEN T FONTAINE
MARK J ANDREW FLORY	(PET)...MARK J. ANDREW FLORY
MARK J ELKINS	(CTE)...JAMES B CHURCH
MARK JORDAN ELINS S.N. TRUST	(TRU)...
MARK JORDAN ELKINS	(CEP)...MARK J. ANDREW FLORY

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Fees and Compensation by Court-Appointed Counsel, Mark J. Andrew Flory ["Petitioner"].

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

- 1 Petitioner was appointed on 11/01/11. Petitioner alleges that services have been rendered for which counsel has not been compensated for the period 03/31/17 to 11/29/17.
- 2 Attorney requests fees and costs of \$9,339.75. Billed at \$350/hour for 24.40 hours' attorney time and \$105/hour for 5.20 hours' paralegal time. Itemized [LF, pgs. 8-.12].
 - a. Expenses consist of items normally considered overhead and not allowed under Local Rule 20-1406(d) totaling \$253.75. Does Court wish to reduce fee request by this amount for a new total of \$9,086.00? JTD.
- 3 No proposed order. Submit Order after Hearing.

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

Page: 18

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 04/03/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600067

CASE NAME: MTR OF ROSARIO BERNAL RADOS

SEE ALSO 19

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ALEXANDER ORONOS

COUNSEL:

ALEXANDER ORONOS (CPE)...JACK B. OSBORN
ROSARIO BERNAL RADOS (CEP)...DONNASUE ORTIZ

GENERAL INFORMATION

Continued from **12/14/16**.

Continued from **01/17/17**. Matter trailing other hearing set.

Continued from **03/21/17** at request of counsel. Attempting settlement.

Continued from **06/20/17**. Matter continued to trial other hearings set.

Continued from **10/17/17 and 11/21/17** at request of counsel. Counsel indicates parties are waiting for final inventory and appraisal.

Continued from 01/23/18 at request of counsel.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Alexander Oronos, son appointed conservator of the person and estate on 05/18/16, \$200,000 bond.
2. Notification of Conservatee's Rights per Pr.C.§1830(c) filed 12/07/16.
3. Determination of Conservatee's Appropriate Level of Care filed 12/7/16.
4. Care Plan in accord with Pr.C. §2352 filed 12/7/16.
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. 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 filed 06/01/16.

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. When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. § 2614.5. If continued, set on a Thursday calendar as initially set.

(lc/lh/nb/lh/nb)

Superior Court of Calif, County of San Bernardino

Page: 19

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 04/03/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600067

CASE NAME: MTR OF ROSARIO BERNAL RADOS

SEE ALSO 18

HEARING:

Accounting Review by ***

COUNSEL:

ALEXANDER ORONOZ (CPE)...JACK B. OSBORN

ROSARIO BERNAL RADOS (CEP)...DONNASUE ORTIZ

GENERAL INFORMATION

Continued from 01/23/18 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 Order appointing conservator of the person and estate, Alexander Oronoz, entered 05/18/16, \$200,000 bond.
- 2 Need final Inventory & Appraisal per Pr.C.§2610.
- 3 No accounting or waiver of account. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 20

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 04/03/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700117

CASE NAME: MTR OF ALEJANDRO RUDY VASQUEZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of LISA VASQUEZ

COUNSEL:

ALEJANDRO RUDY VASQUEZ	(CTP)...CANDICE A GARCIA-RODRIGO
ANISSA M VASQUEZ	(CP)...VOORHEES LAW GROUP
LISA VASQUEZ	(CP)...VOORHEES LAW GROUP
RUDY VASQUEZ	(CP)...VOORHEES LAW GROUP

GENERAL INFORMATION

Lisa Vasquez appointed Temporary Limited Conservator on 05/09/17.

Lisa Vasquez, Rudy Vasquez and Anissa M. Vasquez appointed Limited Co-Conservators of the person on 08/29/17.

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

Page: 21

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 04/03/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700327

CASE NAME: JORDAN BURNETT-RAY

HEARING:

Petition for Appointment of Conservator

COUNSEL:

JORDAN BURNETT-RAY

(CTP)...CRAIG M PARKER

TONYA DENISE RAY

(CP)...CRAWFORD & RANSOM APLC

GENERAL INFORMATION

Continued from **10/11/17**. Court deems this petition to be for Limited Conservatorship. Court appointed Tonya Denise Ray as Temporary Conservator. Court will require a report from Inland Regional Center. Clerk's office to notify Inland Regional Center. Attorney Craig M. Parker appointed counsel for Jordan Burnett-Ray.

Continued from 01/24/18 at request of court. Notice by Judicial Assistant.

THIS CASE SET FOR HEARING ON **AMENDED** (01/26/18) Petition for Appointment of Limited Conservator person only by Tonya Ray, mother

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

1. Petitioner requests a Notice Dispensing with Notice as to father (unnamed); alleges she had sole legal and physical custody of the proposed Conservatee; and as to maternal grandmother who is deceased. JTD.
2. Petitioner requests powers to make decisions as to educational placement. JTD
3. Petitioner seeks medical powers. Capacity Declaration filed 08/28/17; caption A-C is incomplete as to purpose of form. JTD
4. Proposed conservatee is developmentally disabled.
 - a. **Need** report of appointed Counsel Craig M. Parker.
 - b. IRC report filed.
5. **Need** Confidential Screening form.
6. Section 5 to amended petition does not indicate whether proposed conservatee is developmentally disabled. **Need** verified supplement.
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 limited conservatee; authority to access all confidential records, paper, documents,

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.**

- 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. JTD.
8. 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. JTD.
 9. Petitioner requests the authority to apply for and obtain a US Passport and obtain any necessary Travel Visa for proposed Conservatee. JTD.
 10. Citation returned served.
 11. Proof of Service of Notice of Hearing filed 10/11/17 is incomplete at item #4a as to date of mailing. Does Court wish to deem date of mailing as of the date of server's signature? JTD
 12. Proof of Completion of the Conservatorship Training Class filed 10/05/17.
 13. CI Report 10/05/17.
 14. ~Proposed Form Order: 08/28/17

RECOMMENDATION: Trail to 05/03/18

Need to clear notes 4-6 then Court's discretion. If approved, set hearing for Compliance Review for **11/07/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C. §1830(c); Level of Care and Care Plan per Pr.C. §2352.5
(lh/nb)

FUTURE HEARING DATES:

05/03/18 Amended Petition for Limited Conservatorship of the Person

Superior Court of Calif, County of San Bernardino

Page: 22

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 04/03/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700429

CASE NAME: MTR OF ZACHARY DUDECK

HEARING:

Petition for Appointment of Conservator

COUNSEL:

STEPHANIE DUDECK (CPE)...SOHEILA S AZIZI & ASSOCIATES P
ZACHARY DUDECK (CEP)...CRAIG M PARKER

GENERAL INFORMATION:

Continued from 01/23/18. Father reports he will object/file petition for co-conservatorship. Request for estate powers are withdrawn as the only monies are \$250 from SSI and child support. Matter referred to Court Investigator for father to be interviewed. Referred to Court Investigator for investigation and report. Attorney Craig M Parker is appointed for Zachary Dudeck. Notice by Judicial Assistant

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

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

1. Section 1 [LF, p. 2] does not specify orders or powers requested. **Need** verified supplement.
2. Proposed conservatee is developmentally disabled. **Need** report by court-appointed counsel, Craig M. Parker.
3. Medical Capacity Declaration filed.
4. Petitioners request Pr. C. §§ 2351.5 – 2474 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 or withhold consent to all medical decisions for the proposed limited conservatee.

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. 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. Citation returned served.
7. Court Investigator Reports filed 01/18/18 & 03/15/18.
8. **Need** Inland Regional Center Report.
9. Certificate of Completion re Conservatorship Class filed.
10. No competing or amended petition filed as of the review of this matter.
11. ~Proposed Form Order/Letters 11/21/17 & 01/08/18

RECOMMENDATION:

Need to clear notes. If approved, set hearing for Compliance Review for **11/06/18** 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

Page: 23

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

DATE: 04/03/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700447

CASE NAME: MTR OF ALEXANDER SALDIVAR

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ALEXANDER SALDIVAR	(CTP)...MARK J. ANDREW FLORY
JESUS SALDIVAR	(CP)...PRO/PER
MARIA S SALDIVAR	(CP)...PRO/PER

GENERAL INFORMATION:

Continued from 01/23/18. Attorney Mark J. Andrew Flory appointed. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by parents, Jesus and Maria S. Salvidar ["Petitioners"].

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

1. Minor will reach majority on 02/28/18.
2. No bond – person only.
3. Proposed conservatee is developmentally disabled. Report by court-appointed counsel, Mark Flory, filed.
4. Medical Capacity Declaration filed.
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 and consent to all medical decisions for the proposed limited conservatee.
6. 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.

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. Citation returned SERVED.
8. Court Investigator Report filed.
9. Inland Regional Center Report filed.
10. Certificates of Completion re Conservatorship Class filed.
11. ~Proposed Form Order 12/08/17.

RECOMMENDATION:

Court's discretion. If approved, set hearing for Compliance Review for **11/06/18** 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

Page: 24

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

TRUSTS AND MOTIONS

DATE: 04/03/18 TIME: 9:35 DEPT: S37P

CASE#: CON PS0900167

CASE NAME: MARK JORDAN ELKINS

SEE ALSO 17

HEARING:

Fourth and final; etc Account and Report of KERINE E ELKINS and
Petition for allowance of fees filed.

COUNSEL:

CALIFORNIA DEPARTMENT OF STATE	(PET)...PRO/PER
DENNIS SHOGREN	(CEP)...JAMES B CHURCH
KERINE E ELKINS	(CPE)...NOREEN T FONTAINE
MARK J ANDREW FLORY	(PET)...MARK J. ANDREW FLORY
MARK J ELKINS	(CTE)...JAMES B CHURCH
MARK JORDAN ELINS S.N. TRUST	(TRU)...
MARK JORDAN ELKINS	(CEP)...MARK J. ANDREW FLORY

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Fourth and Final Account and Petition for Fees by Attorney Noreen Fontaine on behalf of former Trustee of SNT, Kerine E. Elkins ["Petitioner"].

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

1. Third Account approved on 07/19/17 for period ending 07/31/14. Need Order after Hearing.
2. Accounting period is not specified. Need same.
3. Assets on Hand are not specified. Need same.
4. No Summary of Account or supporting schedules. Need same.
5. Petitioner seeks compensation of \$10,000 for the period from 2014 to 2017. Need itemization via verified supplement.
6. Attorney requests fees of \$43,995.00. Billed at \$350/hour for 125.7 hours' attorney time. Itemized [Acct., LF, pgs. 6-13]. JTD.
7. Attorney requests reimbursement of costs advanced of \$1,786.50. Itemized.
8. Need bank/financial statements.
9. Distribution is not addressed. 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.**

10. Need Notice of Hearing with proof of service.
11. No proposed order.

RECOMMENDATION:

This purported accounting does not appear to be a true and complete accounting of the SNT and should be deemed in the nature of a status report. There is insufficient information and known defects that should preclude the Court from approving this accounting period. Need complete, amended account to be set on first check calendar no sooner than **06/12/18**.

(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.**