



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 04/10/18**

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](mailto: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.

nb0323/0404

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PROBATE**

-----  
DATE: 04/10/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1600453

CASE NAME: ROBERT W REDFEARN

HEARING:

Hearing re Final Discharge

COUNSEL:

CHADD C REDFEARN                      (PET)...MARIELLEN ROSS ATTORNEY AT LAW  
ROBERT W REDFEARN                      (DEC)...

GENERAL INFORMATION:

**Continued from 02/13/18 due to non-appearances. 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 Approving Waiver of Accounting entered 04/10/17.
2. ~Ex-Parte Petition/Order for Final Discharge 02/23/18.

RECOMMENDATION:

RFA.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 04/10/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1601231

CASE NAME: MTR OF LAWRENCE DE LA ROSA HERNANDEZ

**SEE ALSO 3**

HEARING:

Hearing Re: SECOND AMENDED PETITION (FILED 5/17/17)

COUNSEL:

ANITA RENEE MARTINEZ                      (PET)...SELTERS & SELTERS

LAWRENCE DE LA ROSA HERNANDEZ      (DEC)...

Request for Waiver of Court Fees and Costs filed by ANITA RENEE MARTINEZ is GRANTED

See next matter #3.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 04/10/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601231

CASE NAME: MTR OF LAWRENCE DE LA ROSA HERNANDEZ

**SEE ALSO 2**

HEARING:

Hearing Re: OSC RE DISMISSAL (IF NOTES NOT CLEARED)

COUNSEL:

ANITA RENEE MARTINEZ (PET)...SELTERS & SELTERS

LAWRENCE DE LA ROSA HERNANDEZ (DEC)...

Request for Waiver of Court Fees and Costs filed by ANITA RENEE MARTINEZ is GRANTED

GENERAL INFORMATION:

Set at **08/08/17** hearing. No appearance. Notice by Judicial Assistant.

**Continued from 09/05/17** for notes to be cleared. Court deems the amended petition filed 05/17/17 as the second amended petition. Court deems the petition filed on 03/30/17 as the first amended petition. Court vacated the hearing on the first amended petition and takes OSC re Dismissal off calendar.

**Matter set at 12/12/17** hearing due to non-appearance. If petitioner, Anita Renee Martinez, either fails to appear at the next hearing or fails to clear probate notes by the next hearing, then this matter may be dismissed. Notice by Judicial Assistant.

**Continued from 01/09/18. OSC re dismissal as to failure to appear is off calendar; however, OSC re dismissal will be on calendar for next hearing- if probate notes are not cleared by next hearing date, court will dismiss the petition with prejudice. Petitioner states she understands this admonishment. Court notes it will accept the proof of Publication filed on May 30, 2017. Court sets OSC re dismissal for April 10, 2018 and notes that the petition will be dismissed with prejudice if petitioner does not file receipt for lodging of original will, verified supplements as noted on the probate notes re section 5 (7) and (8) as to issue of a predeceased child; a copy of the original will; and notice of petition to administer estate with proof of service (de121).**

THIS CASE IS SET FOR HEARING ON **OSC re Dismissal** (if notes not cleared) on **SECOND AMENDED** Petition (filed 05/17/17) for Probate, Letters Testamentary with Full Authority under IAEA by Anita Renee Martinez (daughter/executor)

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](mailto: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. Second amended petition filed 05/17/17 appears to be identical to the first amended petition filed 03/30/17.
2. Will waives bond. Alternatively, require \$296,000 bond. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
3. **Question if Leticia Juana Martinez named in the Will is the same as Leticia Garcia named in Section 8 of the petition. If not, need service to same.**
4. Proof of Subscribing Witness filed .
5. ~Proposed form Order/Letters: 03/30/17

RECOMMENDATION:

Need to clear note 3 then Courts discretion re bond. If approved, set future hearing for Accounting/Status Review on **06/17/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh/nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 04/10/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1701272

CASE NAME: MTR OF BRUCE OGILVIE SR & OPAL LEILA OGILVIE R.T.

**SEE ALSO 5**

HEARING:

Hearing Re: Demurrer and Demurrer to the Petition

COUNSEL:

MICHAEL OGILVIE                      (PET)...SW SMYTH LLP

1998 MTR OF BRUCE OGILVIE SR &(TRU)...

GREGORY L WIEBE                      (RES)...LAW OFFICE OF DOONAN &

JANIS BRANDY MARTINDALE              (LAW OFFICE OF DOONAN &

RICHARD OGILVIE                      (BENNETT KERNS, ESQ

Currently under review by Legal Research.

(LR)

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

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DATE: 04/10/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1701272

CASE NAME: MTR OF BRUCE OGILVIE SR & OPAL LEILA OGILVIE R.T.

**SEE ALSO 4**

HEARING:

Motion Re: To Strike the Petition Mot Filed by Respondent  
GREGORY L WIEBE, JANIS BRANDY MARTINDALE

COUNSEL:

MICHAEL OGILVIE (PET)...SW SMYTH LLP  
1998 MTR OF BRUCE OGILVIE SR &(TRU)...  
GREGORY L WIEBE (RES)...LAW OFFICE OF DOONAN &  
JANIS BRANDY MARTINDALE (LAW OFFICE OF DOONAN &  
RICHARD OGILVIE (BENNETT KERNS, ESQ

Currently under review by Legal Research.  
(LR)

Superior Court of Calif, County of San Bernardino

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 04/10/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1701273

CASE NAME: CHERI ANN LAWRENCE

HEARING:

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

COUNSEL:

CHERI ANN LAWRENCE (DEC)...  
DAVID M LAWRENCE (PET)...CHRISTOPHER A SHUMATE

GENERAL INFORMATION:

**Continued from 02/27/18. Court finds the proof of publication legally sufficient- court clears note re proof of publication. Matter is continued for remaining probate note re notice to be cleared.**

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

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

1. Petitioner requests a bond of \$80,000 to be fixed. Appears sufficient. JTD.
2. ~Proposed Form Order/Letters 12/19/17.

RECOMMENDATION:

Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **06/18/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)



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

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DATE: 04/10/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1701301

CASE NAME: ESTATE OF MARK NEWTON DAVIS

HEARING:

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

COUNSEL:

JEFFREY CONVERSE (PET)...LAW OFFICE OF MARY M. BADER  
MARK NEWTON DAVIS (DEC)...

GENERAL INFORMATION:

**Continued from 02/13/18. The Court inquires of counsel regarding venue. Counsel represents petitioner has real property in San Bernardino County. Petitioner is ordered to submit a supplement or points and authorities regarding why venue should be retained in San Bernardino. Notice to be given by Attorney Mary M. Bader.**

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by named Executor Jeffrey Converse ["Petitioner"-trustee].

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

1. Decedent resided in Placentia, CA. Venue should be in Orange County per Pr. C. §7051.
2. Attachment 8 to petition does not include Pastor Larry Harris, named in decedent's Will or Danny Smart, Joshua Converse, Caleb Convers, Edwin C. Davis named on proof of service. **Need** verified supplement.
3. Notice filed on 01/10/18 is the wrong type of notice. **Need** Notice of Petition to Administer Estate with proof of service to include Pastor Larry Harris.
4. Will waives bond. Estimated value of estate \$279,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
5. The will conditionally incorporates decedent's Trust. **Need** a certification of trust that meets the requirements in Pr.C. §18100.5.
6. **Need** p's & a's re venue as directed by Court on 02/13/18.

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

RECOMMENDATION: Deny.

Need to clear notes. If approved, set future hearing for Accounting Review on **06/18/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 04/10/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800200

CASE NAME: MTR OF DOROTHY MARIE HOOVER

HEARING:

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

COUNSEL:

DOROTHY MARIE HOOVER (DEC)...  
STEPHEN KARL HOOVER (PET)...DENNIS M SANDOVAL

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full  
authority under IAEA by Stephen K. Hoover ["Petitioner"-son].

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

1. All heirs waive bond. Estimated estate valued at \$200,000. The Court may for  
good cause require that a bond be given, either before or after issuance of  
letters. Pr. C. § 8481(b). JTD.
2. Need proof of publication.
3. ~Proposed Form Order/Letters 02/08/18 & 03/05/18

RECOMMENDATION:

Need to clear note 2 then Court's discretion re: bond. If approved, set future hearing  
for Accounting/Status Review on **06/18/19**. Any account to be filed 30 days in advance  
of hearing. Note requirements of Local Rules.

(nb)



CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

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DATE: 04/10/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1500292

CASE NAME: SARA M KUNST

HEARING:

Accounting Review by \*\*\*

COUNSEL:

JAMES KUNST

(PET)...VALERIE ROSS

SARA M KUNST

(CEE)...

GENERAL INFORMATION

Conservatee died on 12/05/16.

Continued from **05/23/17 and 09/12/17**. Counsel states no assets were marshalled; court requires a verified statement that no assets were marshalled with a request that no accounting is required. Counsel to prepare verified statement with proposed order. Continued from **11/28/17** at request of counsel to file accounting. Court sets deadline for the filing of the accounting for 01/30/18.

**Continued from 03/06/18 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Accounting Review by James Kunst  
[Conservator of the person and estate – son].

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

1. James Kunst, son, appointed temporary conservator of the person and estate on 03/30/16, no bond. General appointment on 08/31/16, \$38,000 bond posted 11/17/16; order and letters not signed/issued.
2. **Final Inventory and Appraisals filed 12/13/16 and 12/13/16 reflect a checking account vested in Petitioner's name for the benefit of the conservatee.**
3. **Supplement filed 03/06/18 alleges no assets were marshaled, however, also acknowledges a bank account with US Bank with a balance of \$2,343.82. Petitioner requests the remaining money in the US Bank Acct. No, XXX7831 be ordered payable to Conservatee's surviving spouse Donald Kunst ; closed; and once completed, terminate the Temporary Conservatorship of the person and estate.**

## RECOMMENDATION

Need pre and post-death accounting per Pr. C. §2620 and Pr. C. §13100 petition.  
(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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 04/10/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1600362

CASE NAME: ASHLEIGH FAYE MIRANDA

**SEE ALSO 12**

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of SHELLY MARIE BURLESON

COUNSEL:

SHELLY MARIE BURLESON      (GPE)...PRO/PER  
ASHLEIGH FAYE MIRANDA      (CEE)...

GENERAL INFORMATION

**Continued from 09/05/17. No appearance. Matter trailed. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Shelley Burelson appointed Conservator of the person and estate on 01/31/17, \$75,000 bond.
2. **Notification of Conservatee's Rights filed. However, section 5 to proof of mailing is incomplete. Question whether a conformed Order Appointing Probate Conservator was attached? Court to inquire.**
3. Final Inventory and Appraisal filed.
4. **Need** Determination of Conservatee's Appropriate Level of Care per Pr.C. §2352.5 (form GC-355).
5. **Question whether SNT has been filed? Court to inquire.**
6. Care Plan filed.

RECOMMENDATION

Need to clear note 4 then Court's discretion re: notes 2 & 5.

(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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 04/10/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1600362

CASE NAME: ASHLEIGH FAYE MIRANDA

**SEE ALSO 11**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

SHELLY MARIE BURLESON (GPE)...PRO/PER  
ASHLEIGH FAYE MIRANDA (CEE)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review by Conservator of the Person and Estate, Shelley M. Burleson.

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

1. Conservator of the Person and Estate, Shelley M. Burleson, appointed on 01/31/17, \$75,000 to be placed in blocked account; **first and current account now due.**
2. **Need** Proof of Acknowledgment of Money Deposited into Blocked Account.
3. No accounting or waiver of account. Need same.

RECOMMENDATION:

Inquire status.

(nb)



Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 04/10/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1700012

CASE NAME: LYDA M SHILLINGBURG

HEARING:

FIRST AND FINAL Account and Report of DONNA WASHBURN and  
Petition for allowance of fees filed.

COUNSEL:

DONNA WASHBURN                      (PET)...CRAIG E WILSON  
LYDA M SHILLINGBURG              (CPE)...

GENERAL INFORMATION:

Conservatee passed away on 03/30/17.

**Continued from 02/13/18 at request of counsel. Jennifer Daniel relieved as  
counsel for conservatee.**

THIS CASE IS SET FOR HEARING ON **AMENDED** (01/16/18) First and Final Account  
and Petition for Fees by Temporary Conservator of the Person and Estate, Donna  
Washburn ["Petitioner"].

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

1. **Inventory and Appraisal filed 01/16/18 reflects \$0.00 assets. Petition indicated the assets of the Conservatee were held in the Conservatee's Trust; assets never moved into the Conservatorship; and petitioner had signatory authority in the Trust Account.**
2. Accounting period 01/23/17 to 05/19/17.
3. **Assets on Hand \$0.00.**
4. Petitioner waives compensation **and does not seek reimbursement.**
5. **Temporary Conservator has arranged for the payment of attorneys' fees outside of the conservatorship estate as there are insufficient assets.**
6. Petition alleges this estate is subject to the terms of The Shillingburg Living Trust and under its testamentary provisions, Petitioner's sister, Marti Mackey, is the Successor Trustee to the Conservatee. In order to facilitate the testamentary dispositions, Ms. Mackey instructed Petitioner to distribute certain sums described in Schedule B [LF, p. 9] to the beneficiaries, totaling \$296,000.
7. No proposed order. Submit Order after Hearing.

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

**RECOMMENDATION:**

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

(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 04/10/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700100

CASE NAME: JOE BAUTISTA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of BERONICA BAUTISTA

COUNSEL:

BERONICA BAUTISTA (CPE)...PRO/PER  
JOE BAUTISTA (CEP)...JACK B OSBORN  
MIGUEL BAUTISTA GONZALEZ (CPE)...PRO/PER

#### GENERAL INFORMATION

Beronica Bautista and Miguel Bautista Gonzalez appointed co-conservators of the person on 09/05/17. Amended letters, person and estate entered 02/13/18.

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. However, service does not include court-appointed counsel, Jack B. Osborn. **Need** proper service.
- 2 Care Plan filed.
- 3 Determination of Conservatee's Appropriate Level of Care filed.
- 4 **Need** final Inventory & Appraisal per Pr.C.§2610.
- 5 **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
- 6 **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)

**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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 04/10/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1700191

CASE NAME: TIMOTHY STAHL

**SEE ALSO 14B**

HEARING:

Hearing Re: VISITATION STATUS

COUNSEL:

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

No notes - Visitation.  
(nb)

Future Hearing:

07/24/18 Readiness calendar

07/24/18 Hearing re: Two competing petitions for conservatorship

08/20/18 Court Trial

08/21/18 Court Trial

08/22/18 Court Trial

08/23/18 Court Trial

08/24/18 Court Trial

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 04/10/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700191

CASE NAME: TIMOTHY STAHL

**SEE ALSO 14A**

HEARING:

Hearing Re: SELECTION & PAYMENT OF 730 EVALUATOR

COUNSEL:

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

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Selection & Payment of 730 Evaluator.

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

1. Matter set at 03/20/18 hearing, wherein, court directed counsel to file proposal of the proposed 730 evaluator by 04/03/18 (unless stipulation is reached by counsel).
2. Behavior report filed.
3. Evidence Code §730 Evaluation Recommendation filed.

RECOMMENDATION:

Court's discretion

(nb)

Future Hearing:

07/24/18 Readiness calendar

07/24/18 Hearing re: Two competing petitions for conservatorship

08/20/18 Court Trial

08/21/18 Court Trial

08/22/18 Court Trial

08/23/18 Court Trial

08/24/18 Court Trial

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

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 04/10/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1700273

CASE NAME: MTR OF CHRISTOPHER M KEISER

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of KELLY L KEISER

COUNSEL:

CHRISTOPHER M KEISER                      (CTP)...  
KELLY L KEISER                                (CP )...PRO/PER

GENERAL INFORMATION

Kelly L Keiser appointed conservator of the person on 09/05/17.

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

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

1. Notification of Conservatee's Rights filed. However, Section 5 to Proof of Mailing is incomplete. Question whether a conformed copy of the Order Appointing Probate Conservator was included? Court to inquire.
2. Care Plan and including a Determination of Conservatee's Appropriate Level of Care filed.

RECOMMENDATION:

Court's discretion re: note 1.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 04/10/18      TIME: 9:30      DEPT: S35P  
-----

CASE#: CON PS1800003

CASE NAME: MTR OF CASEY JONES JR

**SEE ALSO 17**

HEARING:

OSC re: Dismissal

COUNSEL:

CASEY JONES JR                      (CEP)...PRO/PER

DAMOYA JONES                      (CPE)...PRO/PER

TYLIA JONES                      (CPE)...PRO/PER

#### GENERAL INFORMATION

Ex parte orders denied on 01/10/18 due to non-appearance by moving parties.

**Continued from 02/13/18 due to non-appearances. The Court notes the CI's report state the petitioner may withdraw the petition. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON **OSC re Dismissal** on Petition for Appointment of Conservatorship, person and estate by daughter-in-law, Damoya Jones and granddaughter, Tylia Jones ["Petitioners"].

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

- 1      Petitioners request bond not be required because proposed Conservatee receives only SSI of \$1,198.00/month.    JTD.
- 2      Petitioner seeks medical powers. Medical Capacity Declaration filed on 01/03/18 does not include Dementia Attachments GC-313 or Gc-335A; and Sections 4a and 7b are incomplete.    Need complete capacity declaration.
- 3      Petitioners request dementia powers; need appointment of counsel and report by same.
- 4      Petition, sections 3e (1) or (2) and 3g are incomplete; 5a erroneously indicates proposed conservatee is developmentally disabled; and section 11 does not include petitioners.    Need verified supplement.
- 5      List of Required Contact Information form does not include petitioners.    Need same.
- 6      Notice of Conservators Rights is premature and should be completed after order is entered.

**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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

- 7 **Court to review Court Investigator's Report filed 02/06/18.**
- 8 Need return of Citation.
- 9 Need Certificates of Completion re Conservatorship Class.
- 10 Need Notice of Hearing with proof of service.
- 11 ~Proposed Form Order/Letters 01/03/18

**RECOMMENDATION:**

Court to appoint counsel then notes to be cleared. If approved, set hearing for Compliance Review for **11/13/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355). Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **06/18/19**. Any account to be filed 30 days' in advance. Note requirements of Local Rules.

(nb)



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 04/10/18      TIME: 9:30      DEPT: S35P  
-----

CASE#: CON PS1800003

CASE NAME: MTR OF CASEY JONES JR

**SEE ALSO 16**

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CASEY JONES JR

(CEP)...PRO/PER

DAMOYA JONES

(CPE)...PRO/PER

TYLIA JONES

(CPE)...PRO/PER

See prior matter #15.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 04/10/18      TIME: 9:30      DEPT: S35P  
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CASE#: SC SS02388

CASE NAME: MTTR OF DAVID RYAN CAMAIONI

HEARING:

Accounting Review by \*\*\*

COUNSEL:

DAVID RYAN CAMAIONI

(CTE)...DONNASUE ORTIZ

FOREST FOX

(CE )...MAUREEN MURATORE

RON B OLUND

(SC )...J. DAVID HORSPOOL

**XREF: SPRSS01021** (David Ryan Camaioni Revocable Trust)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review by Ron Olund,  
Conservator of the person and estate.

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

1. Ex Parte Petition to Dispense with Accounting and Order entered 05/22/17 for period through 12/01/16.
2. Assets are held in related case – trust.
3. No accounting or waiver of account. Need same.

RECOMMENDATION:

Inquire status.

(nb)

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

-----  
DATE: 04/10/18 TIME: 10:00 DEPT: S35P  
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CASE#: PRO DS1000272

CASE NAME: THOMAS E. WILKES

HEARING:

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

COUNSEL:

KATHERINE FOTCH	(PET)...PRO/PER
PUBLIC ADMINISTRATOR	(PET)...CRAIG M PARKER
THOMAS E WILKES	(DEC)...

GENERAL INFORMATION:

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

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

1. Accounting period 07/01/09 to12/17/17.
2. Assets on Hand \$112,058.87 consisting of cash.
3. Need conformed copy of Reappraisal for Sale Inventory and Appraisal.
4. Statutory fees of \$4,937.81 requested. Calculated.
5. 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. 22] JTD.
6. Petitioner requests authority to withhold the sum of \$6,000 as a reserve.
7. Proposed Order 01/19/18 includes extraordinary fees to both petitioner and  
counsel.

RECOMMENDATION:

Need to clear note 3 then Court's discretion. If approved, set next hearing for final  
discharge on **04/16/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 04/10/18 TIME: 10:00 DEPT: S35P  
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CASE#: PRO PS1401014

CASE NAME: Benjamin Durda

HEARING:

Probate status report filed.

COUNSEL:

BENJAMIN DURDA	(DEC)...
DEANNA DURDA	(TP )...MELVIN L FRIEDLAND
HELEN EVERS	(PET)...KENNER LAW GROUP, PLC
SAN BERNARDINO COUNTY PUBLIC A	(PET)...CRAIG M PARKER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Public Administrator  
[“Petitioner”].

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

1. Petitioner alleges the estate is not in a condition to be closed as there are 2 vehicles which have been inventoried and have been listed for sale but have not yet sold.
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 **04/16/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 04/10/18      TIME: 10:00      DEPT: S35P  
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CASE#: SC SS02842

CASE NAME: MTR OF ANDREW JOSHUA BOWLIN

HEARING:

Hearing Re: STATUS OF CASE IN MISSOURI

COUNSEL:

ANDREW JOSHUA BOWLIN      (CEP)...CRAIG M PARKER

KATHY READE      (CPE)...D. HERSEL W ILSON

**XREF: SCVSS44903** (Andrew Bowlin et al –v-San Bernardino Co Supt )

No notes – Status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**PROBATE**

-----  
DATE: 04/10/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1300285

CASE NAME: ROBERT LYLE MEE

HEARING:

Hearing Re: PTNRS AMENDED FIRST & FINAL

COUNSEL:

DIANE C OSTRANDER	(PET)... (TOPALIAN & ASSOCIATES
GINGER JACOBSON	(PET)...PRO/PER
GINGER JACOBSON	(TP )...PRO/PER
JULIE STEWART	(PET)... ROSE SPELLMAN, I
ROBERT LYLE MEE	(DEC)...
RYAN R MEE	(MIN)...

Request for Waiver of Court Fees and Costs filed by GINGER JACOBSON is GRANTED  
Fee waiver amount due \$1,160.00  
\$695.00 for petitions on 01/21/14  
\$465.00 for petition on 06/12/15

**XREF: PROPS1400042** (Carolyn Jacobson)

GENERAL INFORMATION:

Continued from **06/13/17** to clear probate notes.

Continued from **08/22/17**. Parties state that the amended first account is almost completed and will be filed.

**Continued from 11/07/17, 01/09/18 and 02/27/18 at request of counsel.**

THIS CASE IS SET FOR HEARING ON AMENDED (03/15/17) First and Final Account and Petition for Fees by **Successor Administrator, Julie Stewart** ["Petitioner"-maternal aunt-GAL-guardian of the person and estate in Oklahoma].

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

1. Accounting period 05/12/12 to 02/28/17.
2. Assets on Hand \$297,492.00 consisting of \$257,925 in cash and remaining in personal and real property.
3. Register of actions and laser fiche do not include Inventory and Appraisal filed on 08/04/15 reflecting estate value of \$450,000. Please provide conformed copy.

**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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

4. Petitioner waives statutory compensation of \$8,225.93.
5. Petitioner requests reimbursement of costs advanced (amount not specified)  
Need itemization via verified supplement.
6. Former Administrator, Diane C. Ostrander and her counsel, H.R. Topalian have agreed to reduced statutory fees, each, in the amount of \$3,901.27.
  - a. Topalian further agrees to credit the estate with \$3,317.00 for the monies previously withdrawn by Ostrander from Decedent's Bank of America Account XXX5568.
7. Attorney Rose Spellman requests extraordinary fees of \$12,603.72 and costs of \$1,279.72 for services rendered in connection with recovering \$177,925 in estate assets. Previous payments have been made by petitioner, leaving a balance of \$3,043.22. Billed at \$325/hour for a total of 32.3 hours' attorney time and \$95/hour for 8.7 hours' paralegal time. Need itemization per CRC 7.702 via verified supplement.
8. Need Summary of Account with related schedules.
9. Need Trustee's Deed upon Sale for foreclosed real property.
10. Need legal description of the real properties, including common address, if any, and assessor's parcel number(s).
11. Need vehicle license number(s) and description.
12. Need findings re: sole and separate property.
13. Need findings re: all taxes have been paid, or reserve made for taxes
14. Please file verified supplement indicating if cash has been invested and maintained in an interest bearing account. Pr.C.§ 1064(a)(5).
15. Need statement regarding notice to Franchise Tax Board or notice per Pr. C. § 9202(c)(1).
16. Need address of heir receiving real property.
17. Need Property Tax Certificate per Revenue and Taxation Code § 480.
18. Please have opposing party/counsel approve as to form and content.
19. Proposed Order 03/15/17. All judgments must be complete in themselves without reference to the petition on which they are based (Local Rule 20-614).

**RECOMMENDATION:**

Need amended account to be placed on first check calendar no sooner than **05/29/18**. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.  
(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 04/10/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600218

CASE NAME: ANA L MEDINA REVOCABLE TRUST

HEARING:  
Petition for order confirming trust assets

COUNSEL:  
2008 ANA L MEDINA REVOCABLE TR (TRU)...PRO/PER  
MARCOS MEDINA (PET)...JACK B. OSBORN

Currently under review by Legal Research.

(LR)

Notice given.  
(lh/nb)



Superior Court of Calif, County of San Bernardino

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

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DATE: 04/10/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1601094

CASE NAME: MTR OF MANSIE BOOKER, JR.

HEARING:

Probate status report filed.

COUNSEL:

KIPPY SHANTEL KRUCKENBERG

(PET)...CRAIG E WILSON

MANSIE BOOKER JR

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Executor, Kippy S. Kruckenberg ["Petitioner"].

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

1. Petitioner alleges the estate is not in a condition to be closed as Petitioner is still attempting to sell decedent's interest in the real property located at Highland, CA.
2. Petitioner requests an additional 12 months to close the estate.
3. ~Proposed Order 03/01/18

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **04/16/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

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DATE: 04/10/18      TIME: 8:30      DEPT: S36P  
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CASE#: PRO PS1700395

CASE NAME: MARSHA K GARCIA

**VACATED**

HEARING:

WAIVER Account and Report of NICHOLE M GARCIA, SYNTHIA K GARCIA  
and Petition for allowance of fees filed.

COUNSEL:

MARSHA K GARCIA	(DEC)...
NICHOLE M GARCIA	(PET)...ELISABETH KEMPE-OLINGER
SYNTHIA K GARCIA	(PET)...ELISABETH KEMPE-OLINGER

FUTURE HEARING DATES:

4/12/18 Waiver of Account and Report

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

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DATE: 04/10/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1701276

CASE NAME: ESTATE OF RICHARD BRISCOE

HEARING:

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

COUNSEL:

JUSTIN BRISCOE	(PET)...DEBORAH S WHITE
RICHARD BRISCOE	(DEC)...
TAKISHA BROWN	(PET)...CARMEN QUALLS & ASSOCIATES
YOLANDA BRISCOE	(PET)...CARMEN QUALLS & ASSOCIATES

GENERAL INFORMATION:

Special Letters of Administration issued to Takisha Brown, \$100,000 bond, on 12/22/17. **Continued from 01/23/18.** Ms. Qualls represents that the order for special administration was incorrect and request that the Court sign the corrected order The Court signs the corrected order for special administration this date.

**Continued from 02/26/18 at request of parties. Parties agree to continue this matter to be heard with the competing petition. Parties also agree to have these matters be heard on 03/13/18 due to counsel's inability to appear on 03/12/18.**

THIS CASE IS SET FOR HEARING ON

Petition #1: Petition for Letters of Limited Administration with full authority under IAEA by daughter and sister, Yolanda Briscoe and Takisha Brown [Petitioners].

**Petition #2: Petition for Letters of Administration with Limited Authority under IAEA by son, Justin Briscoe [“Petitioner”].**

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

Petition #1 by Yolanda Briscoe and Takisha Brown:

1. Petitioner Yolanda Briscoe alleges she is decedent’s attorney-in-fact. Does Court wish to require a copy of subject Power of Attorney? **JTD.**
2. Petitioners request no bond as any assets will be deposited into a blocked account. **JTD.**
3. **Objections filed by Justin Briscoe, son, filed 02/05/18; however, need proof of service.**

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

4. **Amended Objections of Cherly Briscoe to Appointment of Takisha Brown filed 03/02/18 and 03/13/18.**
5. ~Proposed Form Order 12/19/17

Petition #2 by Justin Briscoe:

6. Sections 2b and 3c are incomplete. **Need** same.
7. Petitioner requests monies to be held in blocked account in lieu of bond. Estimated value of estate \$420,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. §8481(b). JTD
8. Nomination of this petitioner by siblings Travis and Marcus Briscoe affixed to petition [LF, pgs. 8-9].
9. **Need** proof of publication.
10. Notice filed 03/13/18 is incorrect. **Need** Notice of Petition to Administer Estate with proof of service.
11. **Need** Notice of Change of Address form.
12. **Objections to Justin Briscoe's Petition by Takisha Brown filed 03/12/18.**

RECOMMENDATION: Set for contested hearing.

Need to clear notes 6, 9-11. Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **06/18/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/ww/nb)

FUTURE HEARING DATES:

05/30/18 Hearing re: Petition for Letters of Admin. W/ Limited Authority under IAEA  
05/30/18 Hearing re: Petition for Letters of Admin. W/ Limited Authority under IAEA  
05/30/18 Hearing re: Petition for Letters of Admin. W/ Limited Authority under IAEA  
05/30/18 Mediation Settlement Conference  
06/14/18 Hearing re: Petition for Letters of Admin. W/ Limited Authority under IAEA  
06/14/18 Hearing re: Petition for Letters of Admin. W/ Limited Authority under IAEA  
06/14/18 Hearing re: Petition for Letters of Admin. W/ Limited Authority under IAEA  
06/14/18 Readiness Calendar  
06/25/18 Hearing re: Petition for Letters of Admin. W/ Limited Authority under IAEA  
06/25/18 Hearing re: Petition for Letters of Admin. W/ Limited Authority under IAEA  
06/25/18 Hearing re: Petition for Letters of Admin. W/ Limited Authority under IAEA  
06/25/18 Court Trial

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 04/10/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800195

CASE NAME: MTR OF STEVEN KEITH SELTENREICH

HEARING:

Petition for Letters of Administration with Full Authorization  
to Administer under IAEA

COUNSEL:

MINDY RAINES (PET)...CRAIG M PARKER  
STEVEN KEITH SELTENREICH (DEC)...

GENERAL INFORMATION:

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

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

1. All heirs waive bond. Estimated estate valued at \$174,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
2. Proof of publication filed.
3. ~Proposed Form Order/Letters 03/01/18.

RECOMMENDATION:

RFA. If approved, set future hearing for Accounting/Status Review on **06/18/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 04/10/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800204

CASE NAME: MTR OF DANNY EUGENE PHILLIPS

HEARING:

Petition for Letters of Administration with Full Authorization  
to Administer Under IAEA

COUNSEL:

DANNY EUGENE PHILLIPS

(DEC)...

JANET L DAVIS

(PET)...PRICE LAW FIRM APC

GENERAL INFORMATION:

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

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

1. All heirs waive bond. Estimated estate valued at \$206,200. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b) and petitioner is a non-resident for which court has discretion to require bond per Pr. C. §8571. JTD.
2. Need proof of publication.
3. ~Proposed Form Order/Letters 03/02/18.

RECOMMENDATION:

Need to clear note 2 then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **06/18/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 04/10/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800226

CASE NAME: MTR OF MARIANO VASQUEZ RIOS

HEARING:

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

COUNSEL:

GARTH RIOS (PET)...PRO/PER  
MARIANO VASQUEZ RIOS (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition of Lost Will and for Letters of Administration W/WA and full authority under IAEA by son, Garth Rios ["Petitioner"].

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

1. Decedent was survived by spouse, Josie Rios.
2. Need a copy of the purported Will and state reasons why the presumption in Pr. C. §6124 does not apply via verified supplement.
3. Sections 2d and 3e to petition re: bond is incomplete. Need verified supplement.
4. Character and estimated value of the property of the estate reflected as "TBD." Does Court wish to require minimum bond of \$20,000 until such time as an estimated value can be determined? The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. §8481(b).
5. Section 9d is incomplete as to why other named executors will not act. Need verified supplement.
6. Need proof of publication.
7. Need Notice of Petition to Administer Estate with proof of service.
8. ~Proposed Form Order/Letters 03/08/18.

RECOMMENDATION:

Need to clear notes then Court's discretion re: bond. If approved, set next hearing for Accounting Review on **06/18/19**.

(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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 04/10/18 TIME: 8:30 DEPT: S36P  
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CASE#: RPR RS02935

CASE NAME: NICOLAS HARE SPECIAL NEEDS TRUST

HEARING:

Accounting Review by \*\*\*

COUNSEL:

CLARENCE HARE	(PET)...LINDA J GLADSON
CLARENCE HARE	(PET)...VARNER & BRANDT, LLP
GINA HARE	(PET)...CHRIS SCARCELLA
GINA HARE	(PET)...LINDA J GLADSON
GINA HARE	(TEE)...CHRIS SCARCELLA
NICOLAS HARE SPECIAL NEEDS TRU	(TRU)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Eighth Account approved on 05/26/16; need Order after Hearing.
2. No accounting or status report. Need same.

RECOMMENDATION:

Inquire status.

(nb)



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

-----  
DATE: 04/10/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1600166

CASE NAME: RODRIGO R ROMERO

HEARING:

FIRST AND FINAL Account and Report of ALEJANDRO QUIROGA and  
Petition for allowance of fees filed.

COUNSEL:

ALEJANDRO QUIROGA (CP)...FELIX M MARTIN  
RODRIGO R ROMERO (CEE)...SANDY L. TURNER

Request for Waiver of Court Fees and Costs filed by RODRIGO R ROMERO is GRANTED  
Fee waiver amount due \$465.00 for petition for conservatorship on 06/20/16

Request for Waiver of Court Fees and Costs filed by ALEJANDRO QUIROGA is GRANTED  
Fee waiver amount due \$465.00 for petition for first and final on 06/06/17

GENERAL INFORMATION:

Conservatee passed away on 04/01/17.

Continued from **07/25/17 and 10/03/17** (no appearances). The Court orders the  
petitioner or his counsel of record to appear. Notice to be given by Ms. Turner. Notice  
by Judicial Assistant.

Continued from **11/21/17** to be heard with other pending hearing.

**Continued from 11/28/17 and 02/06/18 at request of counsel to file amended  
accounting. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees  
by Temporary Conservator of the Person, Alejandro Quiroga ["Petitioner"].

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

1. General order/letters to include estate powers granted on 03/01/17 have not  
issued.
2. Court to review report by court-appointed counsel, Sandy Turner, filed on  
06/19/17.
3. Court to review sticky note at LF, p. 6.
4. Final Inventory and Appraisal does not include real property or personal  
property referred to in petition. Need amended inventory.
5. Accounting period 12/21/16 to 05/31/17 (pre & post death periods).

**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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

6. Assets on hand \$0.00. Question the status of conservatee's home/real property? Need verified supplement.
7. No fees or reimbursement for costs are requested.
8. Petitioner requests bond of \$73,700 be exonerated. However, bond is not exonerated until entry of final discharge order.
9. Proposed Order 06/06/17 refers to Temporary Conservator and exonerates bond.

**RECOMMENDATION:**

Need to clear notes. Need amended accounting to be set on first check calendar no sooner than **06/05/18**. Any account to be filed 30 days before 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: 04/10/18 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1700096

CASE NAME: Fausto Sanabia

**SEE ALSO 12**

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of CASTULO SANABIA

COUNSEL:

CASTULO SANABIA (PET)...PRO/PER  
FAUSTO SANABIA (CEE)...CRAIG M PARKER

**X-REF: FAMSS 1604659 (disso)**

GENERAL INFORMATION

Castulo Sanabia appointed conservator of the person and estate on 10/03/17, no bond.

**Continued from 02/27/18 at request of counsel.**

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

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

1. Notification of Conservatee's Rights; Care Plan; and including a Determination of Conservatee's Appropriate Level of Care filed.
2. 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)

Superior Court of Calif, County of San Bernardino

Page: 12

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 04/10/18      TIME: 9:30      DEPT: S36P  
-----

CASE#: CON PS1700096

CASE NAME: Fausto Sanabia

**SEE ALSO 11**

HEARING:

Hearing Re: STATUS ON 850 PETITION

COUNSEL:

CASTULO SANABIA

(PET)...PRO/PER

FAUSTO SANABIA

(CEE)...CRAIG M PARKER

**X-REF: FAMSS 1604659**

Status – no notes.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 13

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

-----  
DATE: 04/10/18 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1800056

CASE NAME: MTR OF JOSEPH A LUCKE

HEARING:

Petition for Appointment of Conservator

COUNSEL:

GLENN W LUCKE	(CP )...PRO/PER
JOSEPH A LUCKE	(CTP)...
SERGIO A LUCKE	(CP )...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by parents Glenn W. Lucke and Sergio A. Lucke ["Petitioners"].

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

1. Proposed Conservatee will not reach majority until 07/23/18.
2. No bond – person only.
3. Proposed conservatee is developmentally disabled. Need report by court-appointed counsel, Candice Garcia-Rodrigo.
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.
7. Citation returned SERVED.
8. Need Court Investigator Report.

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

9. Need Inland Regional Center Report.
10. Certificates of Completion re Conservatorship Class filed.
11. Declarations of Due Diligence as to brother, William Lucke, maternal grandmother, Miriam Gutierrez, maternal grandfather, Gilberto Jimenez and deceased paternal grandparents Barbara and Gary Lucke filed. **JTD.**
12. ~Proposed Form Order/Letters 02/28/18.

**RECOMMENDATION:**

Need to clear notes 3, 8-9 then Court's discretion. If approved, set hearing for Compliance Review for **06/18/19** 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: 1 ADD ON  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY **PROBATE**

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DATE: 04/10/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700127

CASE NAME: MTR OF DAVID CARL HOVSEPIAN  
**SEE ALSO 1A, 1B**

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

COUNSEL:  
CANDACE MELTON (PET)...PRO/PER  
CHRISTIE DAVIDSON (PET)...HORSPOOL & HORSPOOL  
DAVID CARL HOVSEPIAN (DEC)...  
GENEVIEVE RUTH PATTON (PET)...PRO/PER  
MINOR CHILD (MIN)...PRO/PER  
VICTORIA HOVSEPIAN (PET)...KEYSTONE LAW GROUP

**Continued from 04/04/17 on court's motion. Mr. Horspool presents to Court a final appraisal for all three properties.**

Address: 1614 Davidson Street, Loma Linda, CA  
Appraised Value: \$150,000  
Reappraisal: **\$180,000**  
Sale price: \$171,000  
First overbid: \$180,050  
Deposit: \$17,100  
Commission: \$10,260 (6%) to Sierra Realty  
Additional bond: \$300,000  
Reason for Sale: Necessary to pay debts and administrative expenses

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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - no legal or procedural advice will be given.

Exposure to Market: A "For Sale" sign was posted on real property; MLS listing

Notice: Notice was given.

Future Hearing: 6/28/18 Accounting Review  
(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](mailto: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: 1A ADD ON

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

-----  
DATE: 04/10/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1700127

CASE NAME: MTR OF DAVID CARL HOVSEPIAN

**SEE ALSO 1, 1B**

HEARING:

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

COUNSEL:

CANDACE MELTON	(PET)...PRO/PER
CHRISTIE DAVIDSON	(PET)...HORSPOOL & HORSPOOL
DAVID CARL HOVSEPIAN	(DEC)...
GENEVIEVE RUTH PATTON	(PET)...PRO/PER
MINOR CHILD	(MIN)...PRO/PER
VICTORIA HOVSEPIAN	(PET)...KEYSTONE LAW GROUP

**Continued from 04/04/17 on court's motion. Mr. Horspool presents to Court a final appraisal for all three properties.**

Address:	1636 Davidson Street, Loma Linda, CA
Appraised Value:	\$135,000
Reappraisal:	<b>\$155,000</b>
Sale price:	\$151,000
First overbid:	\$159,050
Deposit:	\$15,100
Commission:	\$9,060 (6%) to Sierra Realty
Additional bond:	None
Reason for Sale:	Necessary to pay debts and administrative expenses

**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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

Exposure to Market: A "For Sale" sign was posted on real property; MLS listing

Notice: Notice was given.

Future Hearing: 6/28/18 Accounting Review  
(/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](mailto: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: 1B ADD ON  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

-----  
DATE: 04/10/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700127

CASE NAME: MTR OF DAVID CARL HOVSEPIAN  
**SEE ALSO 1, 1A**

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

COUNSEL:

CANDACE MELTON	(PET)...PRO/PER
CHRISTIE DAVIDSON	(PET)...HORSPOOL & HORSPOOL
DAVID CARL HOVSEPIAN	(DEC)...
GENEVIEVE RUTH PATTON	(PET)...PRO/PER
MINOR CHILD	(MIN)...PRO/PER
VICTORIA HOVSEPIAN	(PET)...KEYSTONE LAW GROUP

**Continued from 04/04/17 on court's motion. Mr. Horspool presents to Court a final appraisal for all three properties.**

Address: 24841 E. Third Street aka 1103 E. Third Street, San Bernardino, CA

Appraised Value: \$150,000

Reappraisal: **\$150,000**

Sale price: \$151,000

First overbid: \$159,050

Deposit: \$15,100

Commission: \$9,060 (6%) to Sierra Realty

Additional bond: None.

Reason for Sale: Necessary to pay debts and administrative expenses

**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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

Exposure to Market: A "For Sale" sign was posted on real property; MLS listing

Notice: Notice was given.

Future Hearing: 6/28/18 Accounting Review  
(/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](mailto: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: 1C

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

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DATE: 04/10/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700358

CASE NAME: MTR OF RICHARD MICHAEL GLAUM

**SEE ALSO 9**

HEARING:

First and Final Account and Report of CANDACE GLAUM and Petition  
for allowance of fees filed.

COUNSEL:

CANDACE GLAUM	(PET)...DARLING LAW OFFICES
NICOLE M ANDERSON	(PET)...PRO/PER
RICHARD MICHAEL GLAUM	(DEC)...
STATE OF CALIFORNIA FRANCHISE	(TP )...PRO/PER

Request for Waiver of Court Fees and Costs filed by NICOLE M ANDERSON is GRANTED

Fee waiver amount due \$143.00

\$40.00 for request for special notice on 08/22/17

\$103.00 for fax and motion fees on 02/21/18

GENERAL INFORMATION:

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

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

1. Accounting period 03/13/17 to 01/12/18.
2. Assets on Hand \$71,655.69 consisting of \$66,655.69 in cash held in attorney's IOLTA account and remaining in personal property.
3. Statutory fees of \$6,850.00. Calculated in a lessor amount. Do parties wish to waive additional statutory fees? **Need** verified supplement.
4. Amount of Inventory and Appraisals total \$205,000 not \$200,900 as reflected on Summary of Account [Acct. 02/06/18, LF, p. 5]. **Need** corrected Summary and affected schedule(s) via verified supplement if additional statutory fees are not waived.
5. **Need** bank/financial statements to support closing balance per Local Rule 20-908.

**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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

6. There appears to be a minor heir. Does Court wish to appoint GAL or guardian of the estate? Petition for Appointment of GAL filed 03/02/18. ~Proposed Form Order 03/02/18. **JTD.**
7. Petitioner requests to withhold the sum of \$465.00 as a reserve.
8. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes then Court's discretion. If approved, set next hearing for receipts and final discharge for **06/18/19**.

(nb)

Future Hearing:

04/17/18 First and Final Account and Report - **VACATE**

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 04/10/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1700380

CASE NAME: MTR OF LAURENCE CARL MALCHOW JR  
HEARING:

Petition for Final Distribution on Waiver of Account and Report  
of MELISSA VALDES-POPE and Petition for allowance of fees filed.

COUNSEL:

LAURENCE CARL MALCHOW JR (DEC)...  
MELISSA VALDES-POPE (PET)...HILMOE LAW GROUP PC

GENERAL INFORMATION:

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

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

1. All beneficiaries waive accounting.
2. Assets on Hand \$225,030.99 consisting of cash.
3. Bond is not signed by Petitioner. **Need** proper bond.
4. Accounting period 03/21/17 to
5. Assets on Hand \$
6. Petitioner waives statutory compensation.
7. Attorney requests statutory fees of \$8,114.22. Calculated.
8. **Need** bank statement to support date of death balance per Local Rule 20-908 for Chase Checking Account.
9. **Need** statement regarding notice to Franchise Tax Board or notice per Pr. C. § 9202(c)(1).
10. The named beneficiaries of the decedents will propose an alternate distribution, which includes a 50% interest to decedent's sole issue, Charlene Gosney. JTD.
11. **Need** Notice of Hearing with proof of service.
12. Proposed Orders 02/13/18 does not include findings re sole and separate property; known creditors; or that petitioner waives compensation.

RECOMMENDATION

Need to clear notes 3, 8-9 & 11 then Court's discretion re alternate distribution. If approved, set next hearing for receipts and final discharge for **04/16/19**.

(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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 04/10/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700499

CASE NAME: DOUGLAS RAY HICKS

HEARING:

Petition for Final Distribution on Waiver of Account and Report  
of VANESSA E LEAL and Petition for allowance of fees filed.

COUNSEL:

DOUGLAS RAY HICKS (DEC)...  
VANESSA E LEAL (PET)...E. MARIE HENNING

GENERAL INFORMATION:

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

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

1. All heirs waive accounting.
2. Accounting period 01/22/16.
3. Assets on Hand \$
4. Statutory fees of \$1,123.18 requested. Calculated.
5. Attorney requests reimbursement of costs of \$751.00. Itemized.
6. **Need** balance and description of the assets on hand, specifically noting the amount of cash included in said balance per Local Rule 20-614(c).
7. **Need** statement to support date of death balances per Local Rule 20-908.
8. **Need** verified supplement indicating if cash has been invested and maintained in an interest bearing account per Pr.C.§ 1064(a)(5).
9. Proposed Order 01/30/18 does not include findings re: sole and separate property; known creditors; whether all taxes have been paid or reserve made for taxes; includes blank lines before signature line; and discharges upon the filing of final discharge instead of upon entry of a final discharge order.

RECOMMENDATION

Need to clear note s6-8 then Court's discretion. If approved, set next hearing for  
receipts and final discharge for **04/16/19**.

(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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**



Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 04/10/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1700518

CASE NAME: JOHN WALLACE CRETHERS

HEARING:

first and final Account and Report of GARY M CRETHERS and  
Petition for allowance of fees filed.

COUNSEL:

GARY M CRETHERS (PET)...FULLERTON, LEMANN, SCHAEFER  
JOHN WALLACE CRETHERS JR (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of  
Account and for Fees by Executor Gary M. Crethers ["Petitioner"].

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

1. All beneficiaries waive accounting.
2. Accounting period 04/28/17 to 12/31/17.
3. Assets on Hand \$427,501.14 consisting of \$412,501.14 in cash and remaining  
in personal property.
4. Petitioner waives statutory compensation.
5. Attorney requests statutory fees of \$11,093.69. Calculated.
6. Petitioner requests authority to withhold \$1,500.00 as a reserve for closing  
costs.
7. ~Proposed Order 02/02/18.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for  
**04/16/19.**

(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 04/10/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700888

CASE NAME: MOHAMMAD ASIF

HEARING:

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

COUNSEL:

LISA E SPIWAK ESQ (TP )...SPIWAK & IEZZA  
MOHAMMAD ASIF (DEC)...  
MOHAMMAD HARRIS BIN ASIF (PET)...MICHAEL C MADDUX

GENERAL INFORMATION

**Continued from 01/08/18 on Court's motion.**

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Mohammad Asif, son

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

1. All heirs waive bond. Net estate value is \$137,286 with \$35,000 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code §8481(b)).
2. Declination/nomination by surviving spouse, Shahnaz Asif filed 01/08/18.
3. **Supplement filed 01/08/18 is signed by attorney. Need verified supplement signed by proposed administrator.**
4. **Notice filed 01/10/18 is incorrect and does not include Key Star Capital Fund c/o Attorney Lisa E. Spiwak per Request for Special Notice. Need Notice of Petition to Administer Estate with proof of service.**
5. ~Proposed Form Order: 09/18/17

RECOMMENDATION

Need to clear notes 3 and 4. Court's discretion re bond. If approved, set Accounting/Status Review for **06/17/19**. Any account to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.  
(cs/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 04/10/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1701278

CASE NAME: MTR OF MICHAEL JOHN MCDONALD

HEARING:

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

COUNSEL:

MICHAEL JOHN MCDONALD      (DEC)...

MICHAEL R.L. MCDONALD      (PET)...DEBRA S POPINEAU

#### GENERAL INFORMATION

**Continued from 01/29/18 at on Court's motion.**

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Michael McDonald, Son/Administrator/Petitioner

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

1. Petitioner is sole heirs and waives bond. Estate value is \$350,000 with \$5,000 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code §8481(b))
2. Proof of publication filed.
3. ~Proposed Form Order: 12/14/17

#### RECOMMENDATION

Court's discretion re bond. If approved, set Accounting/Status Review for **06/17/19**.

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

(cs/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 04/10/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800198

CASE NAME: MTR OF ABBIE GAIL WILLIAMS

HEARING:

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

COUNSEL:

ABBIE GAIL WILLIAMS (DEC)...

JAMES TAGALU (PET)...KING LAW FIRM

GENERAL INFORMATION:

James Tagalu appointed Special Administrator on 03/08/18, \$35,000 bond.

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

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

1. Petitioner requests no bond be set in lieu of limited powers. Estimated estate valued at \$270,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). JTD.

RECOMMENDATION:

Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **06/18/19**. 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: 8

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

-----  
DATE: 04/10/18 TIME: 8:30 DEPT: S37P  
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CASE#: VG VS02118

CASE NAME: SPECIAL NEEDS TRUST OF MAX WINN

HEARING:

SECOND Account and Report of JOHN W WINN and Petition for allowance of fees filed.

COUNSEL:

JOHN W WINN	(GE )...J. TERRENCE MOYNIHAN
MADISON PICABO WINN	(MIN)...
MAX MICHAEL WINN	(MIN)...MITCHELL I ROTH

GENERAL INFORMATION:

Father, Michael Winn, passed away on 06/26/17.

Continued from **09/11/17** at request of counsel to file amended I & A. Attorney Roth to file supplement report re: sale of shares. Court approves caretaker fees. Court notes Social Security benefits for Max will be reinstated in 2018. Court recommends Social Security be contacted re: survivors' payments. Court orders case changed to Special Needs Trust of Max Winn.

**Continued from 01/08/18 at request of Attorney Roth. The court requests clarification of receipts.**

THIS CASE IS SET FOR HEARING ON Second Account Current and Petition for Fees by Trustee, John W. Winn for the SNT

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

1. Accounting period 03/01/16 to 03/31/17.
2. Assets on Hand \$128,537.99 consisting of \$56,537.99 in cash and remaining in stock ownership in a closely-held corporation with Russ Davis.
3. Petitioner requests fees of \$300.00 for professional services rendered to the trust, and the trust beneficiary. Generally described. JTD.
4. Attorney requests fees of \$4,515.00. Billed at \$350/hour for attorney's time. Itemized [LF, pgs. 18-19]. JTD.
5. Current bond of \$206,750.00. Petitioner requests bond reduction per **Supp. filed 09/06/17 to the amount of \$143,000.00. Appears sufficient.**
6. Corrected Inventory and Appraisal filed 09/11/17

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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - no legal or procedural advice will be given.

7. Disbursement – Schedule C [LF, p. 15] includes mail and copy fees totaling \$38.77 which are normally considered overhead per Local Rule 20-1311(d). **Supp. filed 09/06/17 indicate fees are for milling costs in corresponding with Russ Davis, Inc. incurred on behalf of trustee and an outstanding costs incurred by the attorney for the trustee falling outside of the normal overhead costs.**
8. **Supplement filed 09/06/17 indicates current plans to establish a conservatorship of the person of Max Winn in Riverside County.**
9. Petition indicates beneficiary resides in Lake Elsinore, Riverside County with Tera Winn, caretaker. Trustee resides in West Covina, Los Angeles County. **Suggest Court transfer case to Los Angeles County. If so, court to set control date. JTD.**
10. **Statement of Revenue filed 01/04/18.**
11. Notice given.
12. Need Report attorney Mitchell Roth.
13. No proposed order. 09/06/17

**RECOMMENDATION:**

Need Report of Mitchell Roth, then Court's discretion re fees and transfer. If matter transferred, Court to set control date.

(cs/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

## TRUSTS AND MOTIONS

-----  
DATE: 04/10/18      TIME: 8:35      DEPT: S37P  
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CASE#: PRO PS1700358

CASE NAME: MTR OF RICHARD MICHAEL GLAUM

### **SEE ALSO 1C**

HEARING:

Motion Re: Request for Reimbursement Filed by Petitioner NICOLE  
M ANDERSON

COUNSEL:

CANDACE GLAUM	(PET)...DARLING LAW OFFICES
NICOLE M ANDERSON	(PET)...PRO/PER
RICHARD MICHAEL GLAUM	(DEC)...
STATE OF CALIFORNIA FRANCHISE	(TP )...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Request for Reimbursement and Declaration in Support by Nicole M. Anderson ["Petitioner"].

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

1. Petitioner indicates she is the granddaughter of decedent and was not included as an heir at law by Administrator, Candace Glaum.
2. Petitioner states she contacted Administrator's Attorney, Ryan Michael Darling, on various occasions via e-mails, requesting petitioner be added as an heir at law; following up on the status of same; and requesting petition be amended to include Petitioner. E-mails affixed [LF, pgs. 7-18].
3. Petitioner alleges that after not having received a response by Attorney Darling to petitioner's e-mail dated 10/26/17, as well as numerous e-mails requesting petitioner be added as an heir at law, Petitioner filed a Petition for Determination of Entitlement to Estate Distribution. Petitioner claims that Attorney Darling sent her a request via e-mail to withdraw her Petition for Determination as Petitioner was included in the distribution to the First and Final Account filed by Administrator Glaum. Petitioner filed a Request for Dismissal concurrently with the filing of this petition.
4. Petitioner requests reimbursement from the estate in the amount of \$650 for unnecessary expenses incurred by Petitioner for the preparation and filing of the

**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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

Petition for Determination, Request for Dismissal and this petition, due to Administrator Glaums' failure to provide an affirmative response or objections with regard to Petitioner's request to be included as an heir at law.

5. Petitioner does not request sanctions to be imposed at this time.
6. Need Notice of Hearing with proof of service.
7. ~Proposed Order 03/12/18

**RECOMMENDATION:**

Require notice then Court's discretion.

(nb)

Future Hearing:

04/17/18 First and final account and report



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 04/10/18      TIME: 8:35      DEPT: S37P  
-----

CASE#: PRO PS1700919

CASE NAME: THE AGUIRRE FAMILY REVOCABLE TRUST

HEARING:

Petition for Cancellation of trust; for accounting; for transfer  
of property to Gonzalo Aguirre

COUNSEL:

GONZALO AGUIRRE

(PET)...HEALY & ASSOCIATES

THE AGUIRRE FAMILY REVOCABLE T

(TRU)...

Currently under review by Legal Research.  
(LR)

Notice:

Need notice of hearing with proof of service to all Successor Trustees including:  
Guadalupe Ortega Diaz and Maria Carmen; and all beneficiaries including Alma  
Amaya, Angela Cruz, Isabel Flores, Gilbert Ortega, and Aniceto Ortega.  
(cs/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 04/10/18      TIME: 8:35      DEPT: S37P  
-----

CASE#: TRU PS1800028

CASE NAME: MTR OF COSTELLO FAMILY TRUST

HEARING:

Petition for VERIFIED PETITION FOR ORDER DECLARING ASSETS OF  
DECEDENT TO BE TRUST ASSETS

COUNSEL:

COSTELLO FAMILY TRUST	(TRU)...
GEORGE WAYNE FISHER	(PET)...BRIAN W. SMETHURST
LORI M HARDCASTLE	(PET)...BRIAN W. SMETHURST

Currently under review by Legal Research.  
(LR)

Notice:

Notice of Hearing filed 03/23/18 does not give 30' days' notice and does not include  
Karl E. Fisher. Need proper service.  
(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**CONSERVATORSHIP**

-----  
DATE: 04/10/18

TIME: 9:30

DEPT: S37P  
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CASE#: CON PS0800137

CASE NAME: JOE M. TOLLEY SR.

**SEE ALSO 13**

HEARING:

Order to Show Cause RE: SANCTIONS (\$500.00)for FTA/FTF acctg review

COUNSEL:

CHRISTOPHER SUTTON	(PRO/PER
DONNA J TOLLEY	(CPE)...BRIAN C MILES
DONNA TOLLEY	(PET)...MARIELLEN ROSS
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
JOE M TOLLEY SR	(CEP)...DONNASUE ORTIZ
JOHN L GORDON esq	(PET)...DRISKELL & GORDON
MARIELLEN ROSS	(PET)...MARIELLEN ROSS
MICHAEL D TOLLEY	(PET)...PRO/PER
PATRICK	(PRO/PER
ROBERT L KERN	(ROBERT L KERN
RUTH M TOLLEY	(OBJ)...
RUTH M. TOLLEY	(PET)...STEVENSON LAW OFFICE
THOMAS V. TOLLEY	(PCR)...

**XREF: CONPS0900199** (Ruthie Mae Tolley)

**PROPS0900741** (Joe M Tolley, Sr and Ruth M Tolley trust)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re Sanctions (\$500) for Failure to Appear/Failure to File

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

1. Sanctions apply to both Atty B. Miles and Donna Tolley who are both ordered present at next hearing.
2. Accounting to be filed 30 days prior to next hearing.
3. Notice by Judicial Assistant.

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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - no legal or procedural advice will be given.

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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 04/10/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS0800137

CASE NAME: JOE M. TOLLEY SR.

**SEE ALSO 12**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

CHRISTOPHER SUTTON	(PRO/PER
DONNA J TOLLEY	(CPE)...BRIAN C MILES
DONNA TOLLEY	(PET)...MARIELLEN ROSS
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
JOE M TOLLEY SR	(CEP)...DONNASUE ORTIZ
JOHN L GORDON esq	(PET)...DRISKELL & GORDON
MARIELLEN ROSS	(PET)...MARIELLEN ROSS
MICHAEL D TOLLEY	(PET)...PRO/PER
PATRICK	(PRO/PER
ROBERT L KERN	(ROBERT L KERN
RUTH M TOLLEY	(OBJ)...
RUTH M. TOLLEY	(PET)...STEVENSON LAW OFFICE
THOMAS V. TOLLEY	(PCR)...

**XREF: CONPS0900199** (Ruthie Mae Tolley)

**PROPS0900741** (Joe M Tolley, Sr and Ruth M Tolley trust)

GENERAL INFORMATION

**Continued from** 09/14/16,12/12/16, 03/13/17, 06/05/17, 09/11/17 **and 01/08/18. Oral report given by DonnaSue Ortiz.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. On 3/28/16 Court approved the 1<sup>st</sup> Account Current of Donna Tolley, daughter/conservator of person and estate, for the period ending 4/30/14.
  - a. Need Order Settling 1<sup>st</sup> Account Current.
2. Need 2<sup>nd</sup> accounting beginning with 05/01/14.

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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - no legal or procedural advice will be given.

**RECOMMENDATION:**

Inquire status of Order settling 1<sup>st</sup> account current and 2<sup>nd</sup> accounting. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(sa/nb/ww/cs/nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 04/10/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1300029

CASE NAME: MTR OF MATTHEW SHEA UPTON

HEARING:

Hearing Re: OSC re: REMOVAL OF CONSERVATORS AND APPT OF PG

COUNSEL:

FAIRVIEW DEVELOPMENTAL CENTER	(PRO/PER
INLAND COUNTIES REGIONAL CEN	(TP )...STEVEN K BECKETT
JACK L UPTON	(CP )...PRO/PER
JULIA L UPTON	(CP )...PRO/PER
MATTHEW SHEA UPTON	(CTP)...JAMES B CHURCH

GENERAL INFORMATION:

**Continued from 01/29/18. Ms. Ortiz gives an oral report to the Court. Guardian ad litem supports the removal of current guardians. The Court suspends conservator powers of Jack L Upton and Julie L Upton. Temporary conservator not appointed at this time. The Public Guardian nominated DDS as successor conservator. Matter continued to notice to be given. Notice given by Mr. Beckett.**

THIS CASE SET FOR HEARING ON OSC re: Removal of Conservators And Appointment of PG

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

1. Matter set on 10/23/17 wherein Court appointed Donnasue Ortiz Guardian Ad Litem for minor.
2. Oral report of GAL given on 01/29/18.

RECOMMENDATION:

Court's discretion.

(cs/nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 04/10/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1300147

CASE NAME: MARY F CARROLL

**SEE ALSO 16**

HEARING:

Hearing Re: FIRST AND FINAL ACCTG OF N BLICKENSTAFF

COUNSEL:

ALAN CARROLL	(OBJ)...PAMELA Y VALENCIA
ALAN CARROLL	(PET)...PAMELA Y VALENCIA
LALANEYA D STAIGLE	(PET)...HARTNELL LAW GROUP
MARY FRANCES CARROLL	(CEP)... MITCHELL I ROTH
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
NATALIE BLICKENSTAFF	(CPE)...JENNIFER M DANIEL
PUBLIC GUARDIAN	(SC )...DENNIS M SANDOVAL

Request for Waiver of Court Fees and Costs filed by ALAN CARROLL is GRANTED  
Fee waiver amount due \$435.00 for objection on 02/28/18

**\*\*\*Court to rule on following matter #16 prior to addressing this matter.\*\*\***

GENERAL INFORMATION:

Petitioner, Natalie Blickenstaff was appointed successor conservator of the person and estate on 05/02/16. Prior conservator, Lalaneya Staigle's first account was approved through a global settlement on 05/02/16, [order filed 03/15/16]. Need Second and final account of Lalaneya Staigle starting with 05/31/14 – 05/02/16.

**Continued from 11/20/17 on court's motion. Counsel to file a supplement correcting the value of the vehicle to be \$2,300 instead of \$23,000.**

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Natalie Blickenstaff, PPF/conservator

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

- 1 Conservatee passed away 11/13/16. Accounting period: Pre Death 05/02/16-11/13/16; Post 11/14/16 – 09/07/17.
- 2 Pre Death assets on hand: \$90,609.51 cash; Post assets on hand \$67,974.78 cash

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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - no legal or procedural advice will be given.



- 3 Petitioner requests fees in the amount of \$10,649.00 for 87.4/hours at various rates between \$95-125, [Supp. filed 11/13/17]. JTD
- 4 Attorney requests fees in the amount of \$20,017.50. Billed at 56.4/hours at \$325.00/hour and for paralegal at 13.5/hours at \$125.00/hour, [LF, pgs. 45 – 58]. JTD
- 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 Petitioner is requesting final distribution of the remaining estate to the heirs of the deceased. Need petition pursuant to Pr.C. §13100.
- 8 Petitioner has one Supplemental Inventory and Appraisal including conservatee's 2001 Mitsubishi Gallant, with value of \$2,300.00 (I & A filed 02/02/15 by previous conservator). Petitioner disputes the estimated value indicating that the vehicle's renders it unmarketable. Accordingly the vehicle is reflected as a loss in order to match the values represented in the accounting filed by previous conservator.
- 9 Petitioner alleges the estate owes the following attorney or professional fees:
  - a. Mitchell Roth: \$5,287.50
  - b. Pamela Valencia \$15,577.85 and
  - c. Alan Carroll reimbursement of \$15,100.00
- 10 Bond set at \$155,000.
- 11 ~Proposed Order:

**RECOMMENDATION:**

Suggest matter should not be approved until second and final account is filed by previous conservator, LaLaneya D. Staigle. Need to clear notes 5-7, then Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge for **04/15/19**.

(cs/nb)

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

-----  
DATE: 04/10/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1300147

CASE NAME: MARY F CARROLL

**SEE ALSO 15**

HEARING:

second & final Account and Report of LALANEYA D STAIGLE and  
Petition for allowance of fees filed.

COUNSEL:

ALAN CARROLL	(OBJ)...PAMELA Y VALENCIA
ALAN CARROLL	(PET)...PAMELA Y VALENCIA
LALANEYA D STAIGLE	(PET)...HARTNELL LAW GROUP
MARY FRANCES CARROLL	(CEP)... MITCHELL I ROTH
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
NATALIE BLICKENSTAFF	(CPE)...JENNIFER M DANIEL
PUBLIC GUARDIAN	(SC )...DENNIS M SANDOVAL

Request for Waiver of Court Fees and Costs filed by ALAN CARROLL is GRANTED  
Fee waiver amount due \$435.00 for objection on 02/28/18

GENERAL INFORMATION:

Conservatee passed away on 11/13/16.

**Continued from 01/29/18. Parties are attempting settlement. Supplement clearing notes and attorney fee petition of Bryan Hartnell to be filed by 2/28/18. Hearing set 1/30 is advanced and continued to be heard with this hearing. Notice waived.**

THIS CASE IS SET FOR HEARING ON Second and Final Account and Petition for Fees by Lalaneya Staigle, prior conservator

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

- 1 Accounting period 05/31/14 to 05/01/16.
- 2 Assets on hand: \$136,191.04 consisting of \$3,891.04 in cash the remaining in real property and personal property
- 3 **Need** verified declaration for acknowledgment of receipt of fees by Conform Keepers per Local Rule 20-1406(c).
- 4 Petitioner **waives compensation.**

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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - no legal or procedural advice will be given.

- 5 Petitioner **requests reimbursement** of costs advanced of \$450.00. Itemized.
- 6 **Attorney requests fees of \$44,015.00. Billed at \$250-\$425/hour for 100.10 hours' attorney time and \$50-\$125/hour for 121.3 hours' paralegal time. Itemized [see supp. 2/28/18, LF, pgs. 13-31]. JTD.**
- 7 Bond set at \$20,000
- 8 Notice given.
- 9 Petitioner requests to be discharge upon approval of this petition; however, discharge approved upon entry of Order for Final Discharge.
- 10 **Objections filed 01/25/18 by son, Alan Carroll.**
- 11 Proposed order: Orders must be complete in themselves without reference to the petition on which they are based. Local Rule 20-614b

RECOMMENDATION: Matter is contested.

Need to clear note 3, then Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge for **04/15/19**

(cs/nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 04/10/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700439

CASE NAME: MTR OF STEVEN SCHAEFER

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DAWN SCHAEFER (CP)...PRO/PER  
STEVEN SCHAEFER (CTP)...MARK J. FLORY

#### GENERAL INFORMATION

**Continued from 01/08/18 on Court's motion. Training Class filed in open Court Report of Court Investigator has been read and considered by the Court.**

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

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

1. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract, make decisions re: education, medical, psychological services, social and vocational opportunities. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Section 5a indicates minor will be an adult; however, date is not provided. **Need** verified supplement.
4. Petition is not signed or dated. **Need** corrected petition.
5. Petitioner seeks medical powers. Capacity Declaration filed 12/01/17; however, section A re hearing date is incomplete; section 5 re ability to attend court hearing is incomplete and form is not dated at signature line on page 1. **Need** completed form.
6. Confidential Conservator Screening form provides information for minor at section 1. **Need** information for proposed conservator. **Need** corrected form.
7. Proposed conservatee is developmentally disabled. Report of Mark Flory, Court appointment counsel, filed.
8. Proposed conservatee is developmentally disabled. IRC report filed.
9. Certificate of Completion of the Conservatorship Training Class filed.
10. Court Investigator report filed.
11. Return of Citation with Proof of Service filed 12/15/17

**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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

12. ~Proposed Form Order: 12/01/17

**RECOMMENDATION**

Need to clear notes 3-6. If approved, set hearing for Compliance Review for **11/19/18** 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.  
(cs/nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 04/10/18      TIME: 9:30      DEPT: S37P  
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CASE#: SC SS01379

CASE NAME: IN THE MATTER OF ALEX NOE LLAMAS

HEARING:

Accounting Review by \*\*\*

COUNSEL:

ALEX NOE LLAMAS

(CEP)...

MARIA LLAMAS

(CP )... HARTNELL LAW GROUP

MARIA LLAMAS

(CPE)...HARTNELL LAW GROUP

GENERAL INFORMATION:

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

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

1. Order Settling Ninth Account entered 07/25/17; eighth account now due beginning 02/10/17.
2. No accounting or waiver of account. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 04/10/18 TIME: 9:30 DEPT: S37P  
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CASE#: VC VS249

CASE NAME: IN THE MATTER OF JOHN P JOSEPH

**SEE ALSO 20**

HEARING:

Hearing Re: COURT INVESTIGATOR REPORT

COUNSEL:

JOHN PAUL JOSEPH

(PLA)...JENNIFER M DANIEL

MICHAEL A JOSEPH

(PET)...THE LAW OFFICES OF SCOTT M SHI

PUBLIC GUARDIAN

(TC )...COUNTY COUNSEL

GENERAL INFORMATION:

**Continued from 12/18/17.** Ms. Daniel requests clarification as to what the court wants her to report on. Counsel reports her client is living in Apple Valley with his brother Michael and that Michael will not pursue a conservatorship since his mother named him successor conservator in her will. As there is no conservatorship currently in place, the Court appoints the Public Guardian as temporary conservator of the person and estate of John Joseph. Public Guardian is ordered to file a petition and to conduct initial investigation in this matter. Public Guardian to prepare order and letters of temporary conservatorship.

**Continued from 01/08/18 on Court's motion. Mr. John Joseph is to file Petition for Conservatorship by 02-13-2018. All existing temporary orders shall remain in full force and effect until 04/10/2018**

THIS CASE SET FOR HEARING ON Court Investigator Report

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

1. Matter continued from 11/16/17, wherein after review of CI report filed 11/06/17, Court appointed Jennifer Daniel as counsel for conservatee, John Paul Joseph.
2. Need Petition for Conservatorship of John P. Joseph by Public Guardian.

RECOMMENDATION:

Inquire status of report. Court's discretion.

(cs/nb)

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

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

-----  
DATE: 04/10/18 TIME: 9:30 DEPT: S37P  
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CASE#: VC VS249

CASE NAME: IN THE MATTER OF JOHN P JOSEPH  
**SEE ALSO 19**

HEARING:

Petition for appointment of successor conservator of the person  
filed by Michael A Joseph

COUNSEL:

JOHN PAUL JOSEPH	(PLA)...JENNIFER M DANIEL
MICHAEL A JOSEPH	(PET)...THE LAW OFFICES OF SCOTT M SHI
PUBLIC GUARDIAN	(TC )...COUNTY COUNSEL

GENERAL INFORMATION:

Michael A. Joseph appointed temporary conservator of the person on 02/27/18.

GENERAL INFORMATION

Prior Conservator, Dorothy H. Joseph (mother) died on 10/22/17.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Successor  
Conservator of person by brother, Michael A. Joseph ["Petitioner"].

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

1. No bond – person only.
2. Petitioner seeks Pr. C. §2590 powers to sell real and/or personal property, including conservatee's primary residence. However, petition is as to person only.
3. Proposed conservatee is developmentally disabled. Report by court-appointed counsel, Jennifer Daniel, filed.
4. Petitioner requests medical powers. Last Medical Capacity Declaration purportedly filed 02/23/88. Does Court wish to require an updated capacity declaration? **JTD.**
5. Petitioners request Pr. C. § 2351.5 -2358 powers but does not specify orders, facts and reasons. Need verified supplement.
6. **Need** Court Investigator Report.
7. 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.**

**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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**



8. **Need** Certificate of Completion re Conservatorship Class.
9. Notice filed on 03/28/18 references amended petition. **Need** proper notice.
10. ~Proposed Form Order/Letters 03/22/18.

RECOMMENDATION: Trail to 04/30/18

Need to clear notes then Court's discretion. If approved, set hearing for Compliance Review for **11/13/18** 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)

FUTURE HEARING DATES:

04/30/18 Amended Petition for Successor Conservatorship by Michael A. Joseph.

**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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**