



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 04/11/18

The notes on the following pages were updated approximately three court days prior to the hearing to reflect newly-filed documents. Documents filed now after that update typically will not be reviewed except on the date of hearing at the judge's discretion.

Destruction of Filed Documents:

Shredding/destruction of all court documents filed and imaged before January 2011 will begin soon. All filed/imaged documents are shredded one year after filing pursuant to court policy. Any filed original documents not retrieved timely will be permanently lost. (Wills and codicils lodged into the will vault will not be affected.)

Contacting the Probate Examiners:

Probate Examiners' email address: ProbateNotes@sb-court.org

Emails must have the case identification information and hearing time/date in the subject line. No attachments will be opened. Probate Examiners can only respond to inquiries regarding the meaning of comments in the notes. Please do not email to notify that documents have been filed, to request a confirmation whether documents have been received, or to request the clearing of notes. No legal or procedural advice may be given by examiners in response to your email.

03/26/18lh; 04/06/18lh

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: 04/11/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS0900753

CASE NAME: JASMINE DIAZ

HEARING:

Accounting Review

COUNSEL:

SAUL DIAZ (PET)...PRO/PER

JASMINE DIAZ (MIN)...

THE JASMINE DIAZ SPECIAL NEEDS TRUST (TRU)...

VIDA F NEGRETE (PET)...FARMER & RIDLEY

VIDA F. NEGRETE (TEE)...GIFFORD, DEARING & ABERNATHY,

ROBERTA L TAYLOR (PET)...ROBERTA L. TAYLOR & ASSOCIATES

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Vida F. Negret, Trustee

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

1. Order settling fourth account current approved on 11/30/16.
2. Fifth account current now due.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/11/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1300251

CASE NAME: ROSEMARY MCNALLY HILL

SEE ALSO 3 4

HEARING:

Hearing re Final Discharge

COUNSEL:

ROBERT RAYMOND HILL III	(PET)...PRO/PER
ROSEMARY MCNALLY HILL	(DEC)...
BARBARA HILL	(OBJ)...PRO/PER
BERNARD M BIDART	(PRO/PER)

See notes on next matter #3.

(lh)

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

DATE: 04/11/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1300251

CASE NAME: ROSEMARY MCNALLY HILL

SEE ALSO 2 4

HEARING:

Hearing Re: OSC RE SANCTIONS IN AMOUNT OF \$500.00

COUNSEL:

ROBERT RAYMOND HILL III	(PET)...PRO/PER
ROSEMARY MCNALLY HILL	(DEC)...
BARBARA HILL	(OBJ)...PRO/PER
BERNARD M BIDART	(PRO/PER)

GENERAL INFORMATION

Continued from 02/07/18. No appearance. Court continued matter and set OSC re surcharge and \$500 sanctions, each, for failure to appear. Court ordered both administrator and their counsel to personally appear at next hearing. Notice given by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON **OSC re Sanctions and Surcharge/Final Discharge of Executor, Robert Raymond Hill**

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

1. **Need** receipts from Kathleen Arriola, Barbara Norris, Robert Hill, III, and James Hill.
2. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Court's discretion re OSC. Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/11/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1300251

CASE NAME: ROSEMARY MCNALLY HILL

SEE ALSO 2 3

HEARING:

Hearing Re: OSC RE SURCHARGE IN AMOUNT OF \$500.00

COUNSEL:

ROBERT RAYMOND HILL III	(PET)...PRO/PER
ROSEMARY MCNALLY HILL	(DEC)...
BARBARA HILL	(OBJ)...PRO/PER
BERNARD M BIDART	(PRO/PER)

See notes on prior matter #3.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/11/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500533

CASE NAME: MTR OF HELEN IRENE MARCUCCI

SEE ALSO 6 7

HEARING:

Hearing re Final Discharge

COUNSEL:

CINDY DIENER	(PET)...MARIVEL M ZIALCITA
HELEN IRENE MARCUCCI	(DEC)...
LIBERTY MUTUAL INSURANCE	(TP)...

See next matter #6.

(lh)

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

DATE: 04/11/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500533

CASE NAME: MTR OF HELEN IRENE MARCUCCI

SEE ALSO 5 7

HEARING:

Hearing Re: OSC RE SANCTIONS IN AMOUNT OF \$500.00

COUNSEL:

CINDY DIENER (PET)...MARIVEL M ZIALCITA
HELEN IRENE MARCUCCI (DEC)...
LIBERTY MUTUAL INSURANCE (TP)...

GENERAL INFORMATION

Continued from 02/07/18. No appearance. Court continued matter and set OSC re surcharge/\$500 sanctions for failure to appear/file. Court ordered both administrator and their counsel to be personally present at next hearing.

THIS CASE IS SET FOR HEARING ON **OSC re sanctions and surcharge/Final Discharge**

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

1. Order on First and Final Account approved 02/01/17 provides for **\$30,842.70**, each, to Alfred Marcucci, Jr; Jeff Marcucci, Cindy Diener, Linda Swanson, and Sherri Richmond.
2. Receipts filed 10/26/17. Cindy Diener, Sherri Richmond, and Linda Swanson received **\$17,708.05**, each. Alfred Marcucci, Jr, and Jeff Marcucci received **\$17,546.93**, each.
3. **Need** receipts for remaining distribution shares pursuant to Order entered 02/01/17.
4. Ex Parte Petition for Final Discharge and Order received 02/23/18 and returned by Court on 03/02/18. **Need corrected form.**

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/11/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500533

CASE NAME: MTR OF HELEN IRENE MARCUCCI

SEE ALSO 5 6

HEARING:

Hearing Re: OSC RE SURCHARGE IN AMOUNT OF \$500.00

COUNSEL:

CINDY DIENER	(PET)...MARIVEL M ZIALCITA
HELEN IRENE MARCUCCI	(DEC)...
LIBERTY MUTUAL INSURANCE	(TP)...

See notes on prior matter #6.

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

DATE: 04/11/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600721

CASE NAME: LEWIS FREDERICK SMITH

HEARING:

Accounting Review

COUNSEL:

BELINDA LLONA HILL (PET)...RICHARD S PRICE
LEWIS FREDERICK SMITH (DEC)...

GENERAL INFORMATION

Continued from 12/13/17 at request of Counsel to clear probate notes. Court ordered Counsel to file accounting by 4PM on 03/05/18. If accounting is heard by deadline, then accounting hearing shall be heard on 04/11/18 at 8:30am.

THIS CASE IS SET FOR HEARING ON Accounting Review re Belinda Hill, executor

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

1. Letters Testamentary issued to Belinda Hill (daughter/executor) on 10/05/16 with full authority and no bond.
2. Final Inventory and Appraisal filed 03/12/18; however, attachments are missing. **Need completed Final Inventory and Appraisal.**
3. No accounting or status report of administration. **Need** same.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 04/11/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700622

CASE NAME: KARIN BOOTH

HEARING:

First and Final Account and Report of MAXINE BUSCEMI and
Petition for allowance of fees filed.

COUNSEL:

MAXINE BUSCEMI (PET)...DIANA J CARLONI
KARIN BOOTH (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Report of
Administrator; Petition for Final Distribution of Estate and Fees by Maxine Buscemi,
Executor

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

1. Assets on hand: \$94,092.97, cash
2. Petitioner requests reimbursement of costs re filing fees, publication,
appraisal, bond and certified copies totaling **\$1,749.50**, of which petitioner
shall receive \$1,100 and attorney receive remaining \$649.50. Itemized.
[Acct, 1/30/18, LFpg6] **JTD**
3. Statutory fees of **\$7,217.76**, each, requested by petitioner and
attorney. Calculated. [Acct, 1/30/18, LFpg7]
4. **Need** bank statement verifying final ending balance per Local Rule 20-908.
5. **Need** verified supplement indicating if cash has been invested and
maintained in an interest bearing account. Pr.C .§ 1064(a)(5).
6. Petitioner requests reserve of **\$600** for final fiduciary tax return. **JTD**
7. Proposed order submitted 1/30/18. Petitioner is not entitled to discharge until
filing of receipts *and* entry of order for final discharge. *Need revised
proposed order.*

RECOMMENDATION:

Need to clear notes #4-5 then Court's discretion. If approved, court to set hearing on
filing of receipts and final discharge to include informal account re reserves for
04/17/19. (lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/11/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1701061

VACATED AND MOVED TO DEPT S36

CASE NAME: MTR OF JUDIE L REEDER

SEE ALSO 11

HEARING:

Petition for Spousal Property

COUNSEL:

JONNI JOSWICK-TERRY	(PET)...PATTERSON LAW FIRM, APC
JUDIE L REEDER	(DEC)...
DARREN E REEDER	(PET/TP)...THOMAS W DOMINICK

XREF: PROPS1700975 MTR OF JUDIE L REEDER

Superior Court of Calif, County of San Bernardino

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

DATE: 04/11/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1701061

VACATED AND MOVED TO DEPT S36

CASE NAME: MTR OF JUDIE L REEDER

SEE ALSO 10

HEARING:

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

COUNSEL:

JONNI JOSWICK-TERRY	(PET)...PATTERSON LAW FIRM, APC
JUDIE L REEDER	(DEC)...
DARREN E REEDER	(PET/TP)...THOMAS W DOMINICK

XREF: PROPS1700975 *MTR OF DAVID HAROLD REEDER*

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

DATE: 04/11/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800183

CASE NAME: MTR OF MARGARET CLEMENTINE HANSARD

HEARING:

Petition to determine succession to Real Property

COUNSEL:

DAVID R HENRY (PET)...JOHN F WEBER
MARGARET CLEMENTINE HANSARD (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by David R. Henry (executor), Jan Henry, Judy Henry and Brandon Ness

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

1. Petitioners seek 100% interest, 25% each, in decedent's 100% interest in real property per the will.
2. Notice is complete.
3. ~Proposed Form Order: 02/23/18

RECOMMENDATION

Court's discretion.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/11/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800191

CASE NAME: LENHERT FAMILY TRUST CREATED BY AGREEMENT ETC

HEARING:

Petition for Compelling accounting by Marilyn Mathre and Rex A. Mathre trustee of
etc

COUNSEL:

PAMELA LENHERT (PET)...LAMB MORRIS & LOBELLO
JON LENHERT (PET)...LAMB MORRIS & LOBELLO
LENHERT FAMILY TRUST CREATED BY AGREEMENT (TRU)...

Currently under review by legal research.

(LR)

Need notice of hearing and proof of service to include 30 days' notice to beneficiaries:
Henry Walter; Mabel Zook; Mary Pemberton; Marjorie Berrain; Myrta May; and Marlin
Lenhert.

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

DATE: 04/11/18 TIME: 8:30 DEPT: S35P

CASE#: SPR SS05961

CASE NAME: MTTR OF EDWARDS CHILDREN SPECIAL NEEDS TRUST

HEARING:

Eighth Account and Report of DEVIN EDWARDS SR and Petition for allowance of fees filed.

COUNSEL:

EDWARDS CHILDREN SPECIAL NEEDS TRUST (TRU)...
DEVIN EDWARDS SR (PET/TEE)...FULLERTON LEMANN SCHAEFER & DO

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Eighth Account Current and Report of Special Needs Trustee, Waiver of Trustee's Compensation; Petition for Withdrawal from Blocked accounts and Petition for Allowance of Attorney's Fees

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

1. Accounting period: 10/30/15 to 10/30/17
2. Assets on hand: \$70,115.53, cash of \$5,187.44, real property with a carry value of \$62,956.00 and the balance in personal property.
3. Petitioner alleges the current bond posted in the sum of \$100,000 remains sufficient. Appears sufficient.
4. Petitioner waives fees as trustee during this accounting period.
5. Attorney requests fees of **\$1,856**, which includes reimbursement of costs advanced of **\$492.50**. Fees billed at 8.05 hours for \$350/hour for attorney time and \$110/hour paralegal time for period 12/01/15 to 01/26/18. Itemized. [Acct, 01/30/18, LFpgs45-47]. **JTD**
6. Petitioner requests authority to withdraw \$25,000 from Union Bank account x2264 of Shelby Edwards in order to pay mortgage, bond premium and attorney's fees to be deposited into Edwards Children SNT trust account x3702. **JTD**
7. Notice complete.
8. ~Proposed Order: 01/30/18

RECOMMENDATION:

Court's discretion re fees and withdrawals from blocked account. If approved, set next accounting review for **01/09/19 (if one year) or 01/08/20 (if two years)**. Accounting to be filed 30 days in advance.

(lh)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIPS

DATE: 04/11/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS0800031

CASE NAME: JOSE JUAN PADRON RODRIGUEZ

VACATED

HEARING:

Accounting Review re Final Account of Greg Oveross

COUNSEL:

EVELYN JENNIFER PADRON

(PCR/CPE/CP)... J. DAVID HORSPO

JOSE JUAN PADRON RODRIGUEZ

(PCE)...MITCHELL I ROTH

GREG OVEROSS

(SC)...PATRICK L. HANRAHAN

JOSE JUAN PADRON RODRIGUEZ

(CEP/CTP)...MITCHELL I ROTH

MITCHELL I ROTH

(PET)...MITCHELL I ROTH

MATTHEW E SHEASBY

(PET)...CHO, SHEASBY, CHUNG & IG

S.N. TRUST OF JOSE JUAN PADRON

(TRU)...

LOURDES BARRAGAN

(RES)...LENITA A SKORETZ

XREF: SBFSS67433 (MF Lourdes Barragan vs Juan Padron)

CIVDS1504049 (24-Seven Home Health -V- Rodriguez)

GENERAL INFORMATION

On 12/20/17, Court accepted resignation of Greg Oveross as the Conservator of Estate of Jose Juan Padron and as Trustee of the SNT. Court appointed Evelyn Jennifer Padron as Successor Trustee of the SNT and as Conservator of the Estate of Jose Juan Padron Rodriguez, with \$20,000 bond as to conservatorship and \$465,000 bond as to SNT. Court set hearing re final account of Greg Oveross for 04/11/18.

THIS CASE IS SET FOR HEARING ON Accounting Review re Final Account of Greg Oveross

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

1. Court approved Seventh Account Current of Greg Oveross on 12/20/17.
2. **Need 8th** and final accounting.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 04/11/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS0800265

CASE NAME: MARISA NICOLE SILVA

HEARING:
Accounting Review

COUNSEL:

MICHAEL ANTHONY SILVA	(CPE)...E LAWRENCE BROCK
MARISA NICOLE SILVA	(CEP)...
LEO MARTINEZ	(PET)...JENNIFER GERARD
OLGA MARTINEZ	(SC)...JENNIFER GERARD
JANINA CABRERA	(SC)...JENNIFER GERARD
LEO MARTINEZ	(PET)...GAREIT NEWSTROM
OLGA MARTINEZ	(PET)...GAREIT NEWSTROM
JANINA CABREAR	(PET)...GAREIT NEWSTROM

GENERAL INFORMATION

Continued from 02/21/18. No appearance or accounting filed. Court ordered Jennifer Gerard to be personally present on 04/11/18. Notice given by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Second Account of Leo and Olga Martinez and Janina Cabrera (parents and sister) approved on 08/24/17 for period ending 12/31/16.
2. **Need** Third Account Current or Waiver for period commencing 01/01/17.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/11/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700042

CASE NAME: WILLIAM JUNIOR SANDY YOUNG

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of BARBARA ETTA SMITH

COUNSEL:

BARBARA ETTA SMITH (CP)...PRO/PER
WILLIAM JUNIOR SANDY YOUNG (CTP)...PRO/PER

GENERAL INFORMATION

Continued from 12/20/17. No appearance. Court sets OSC re surcharge in the amount of \$500 for failure to appear. Court orders conservator to be personally present on 02/21/18. Citation issued to Barbara Smith who is cited appear on 02/21/18 and show cause why failure to appear.

Continued from 02/21/18. Court took off calendar the OSC re surcharge set for 02/21/18. Court noted it will not proceed with cite on the conservator. Matter continued. Notice given by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Barbara Smith appointed Conservator of the person of William Young on 05/17/17.
2. Notification of Conservatee's rights filed 05/30/17.
3. Care Plan filed 08/08/17.
4. Determination of Conservatee's Appropriate Level of Care filed 08/08/17 is incomplete at item#2a and #4a regarding conservatee's personal residence.
Need completed form.

RECOMMENDATION

Need to clear notes 4-5.

(lh)

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

DATE: 04/11/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700411

CASE NAME: MTR OF ARTHUR GENE FELDMAN

HEARING:

Petition for Appointment of Conservator

COUNSEL:

JESSICA ROUNDTREE	(PET)...PRO/PER
CORRY FELDMAN	(CPE)...PRO/PER
ARTHUR GENE FELDMAN	(CEP)...WALTER T. MOORE

X-REF: CIFMS 1700007 (RO re: son, Mark Bruner)

GENERAL INFORMATION

Continued from 12/19/17. Walter T. Moore appointed for Arthur Feldman. Next hearing set 02/21/18. Court set deadline for filing of competing petition for 4:00PM on 01/23/18. Court noted if competing petition is not filed by that date, Court will deem objections waived. Notice given by Judicial Assistant.

Continued from 02/21/18. Court cleared not re citation as proposed conservatee was present this date. Matter continued for petitioner to clear remaining probate notes.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by son, Corry Feldman as petitioned by Jessica Roundtree.

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

1. Outdated petition used that does not include Indian Ancestry questions. JTD.
2. Petitioner requests bond be fixed in the amount of \$10,000. However, estimated estate valued at \$85,000. Suggest bond of \$93,500 (includes recovery). JTD.
3. Section 1 to petition [LF, p. 2] does not specify the type of orders sought. **Need** verified supplement.
4. Petitioner seeks medical powers. **Need** Medical Capacity Declaration with dementia attachment GC-335A.
5. Petitioner requests dementia powers. **Need report of Counsel Moore.**

6. List of Required Contact form does not include Corry Feldman. **Need** completed form.
7. **Need** Court Investigator's Report.
8. **Need** Notice of Hearing with proof of service
9. Certificate of Completion re: Conservatorship Class filed.
10. ~Proposed Form Order/Letters 11/09/17.

RECOMMENDATION:

Need to clear notes 3-8. Courts discretion re notes 1 & 2. If approved, set hearing for Compliance Review for **11/14/18** 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 **06/12/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/lh)

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

DATE: 04/11/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800031

CASE NAME: MTR OF ANDRES J MARTINEZ

HEARING:
Case Management Conference

COUNSEL:

ANA ALTAMIRANO (CP)...PRO/PER
JUAN MARTINEZ (CP)...PRO/PER
ANDRES J MARTINEZ (CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Case Management Conference re Limited
Conservatorship

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

1. Ana Altamirano and Juan Martinez, parents, appointed Limited Co-Conservators of person only of Andres J. Martinez on 05/30/13 in Los Angeles County, case received on 03/16/18.
2. Does court wish to require a Court Investigator report per Pr.C. § 2217(b)(3)?
JTD
3. Does court wish to require an IRC inquiry/report? JTD
4. **Need** post move notice per CRC 7.1063(c) including notice to South Central Los Angeles Regional Center and Inland Regional Center.
5. **Need** amended letters to reflect this county.

RECOMMENDATION

Need to clear notes 4-5 then Court's discretion.

(lh)

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

DATE: 04/11/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800062

CASE NAME: MTR OF COLTON MENARD

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MARK MENARD (CP)...JEFFREY A GOTTLIEB
COLTON MENARD (CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Mark Menard, father

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, consent/withhold consent to marriage, limit right to contract, control social/sexual contacts, and make decisions re education. **JTD**
2. Petitioner seeks to limit all civil rights described in note #1. **JTD**
3. Petitioner seeks additional Court orders regarding visitation schedule. [Petition, 03/01/18, LFpg13]. **JTD**
4. Petitioner seeks medical powers. **Need** Capacity Declaration.
5. Proposed conservatee is developmentally disabled. **Need** appointment of counsel for report.
6. Proposed conservatee is developmentally disabled. **Need** IRC report.
7. Petition, item #11 list of relatives is missing Terrance Williams (mgf). **Need** verified supplement.
8. **Need** Court Investigator report.
9. **Need** Certificate of Completion of the Conservatorship Training Class.
10. **Need** return of citation.
11. **Declaration of Attorney requesting continuance filed 04/04/18. Suggest Court continue 05/30/18, or later Wednesday calendar.**
12. No proposed order submitted.

RECOMMENDATION

Need to clear notes #4-10. **Court's discretion re note #11.** If approved, set hearing for Compliance Review for **11/14/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh)

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

DATE: 04/11/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800063

CASE NAME: SAMANTHA GARCIA

HEARING:

Petition for Appointment of Conservator

COUNSEL:

SAUL GARCIA	(CP)...PRO/PER
GUADALUPE DIAZ GARCIA	(CP)...PRO/PER
SAMANTHA GARCIA	(CTP)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Saul and Guadalupe Garcia, parents

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

1. Petitioners seek orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract. **JTD**
2. Proposed Conservatee's civil rights not to be limited without court order.
3. Petitioners seek medical powers. Capacity Declaration filed 03/14/18; however, item #5 was not completed, and item #7b is missing physician's initials. **Need completed form.**
4. **Need** report of appointed Counsel Mitchell Roth.
5. Proposed conservatee is developmentally disabled. **Need** IRC report. **IRC letter frilled 03/29/18 requesting 45-day continuance. Suggest Court continue to 05/23/18, or later Wednesday calendar. JTD**
6. **CI Report filed 04/04/18.**
7. List of required contacts filed 03/07/18 is missing Juan Garcia (pgf). **Need** completed form.
8. **Proof of Completion** of the Conservatorship Training Class filed.
9. Return of Citation filed 03/21/18.
10. ~Proposed Form Order: 03/07/18

RECOMMENDATION

Court's discretion re continuance to 05/23/18.

Need to clear notes #3-5. If approved, set hearing for Compliance Review for **11/14/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Civil
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CIVIL**

DATE: 04/11/18 TIME: 8:30 DEPT: S36P

CASE#: CIV DS1715025

CASE NAME: MUNCY-V-DOMINGUEZ

HEARING:

Hearing Re: STATUS

COUNSEL:

MANUELA R MUNCY (PLA)...ELBERT W MUNCY
AUGUSTINE GRANADO (PLA)...ELBERT W MUNCY
JOE GRANADO (PLA)...ELBERT W MUNCY
BLANCA E PETTEGREW (PLA)...ELBERT W MUNCY
ROSA M GRANADO DOMINGUEZ (DEF)...
PARAMOUNT RESIDENTIAL MORTGAGE
ESTATE OF CARMEN RAYA GRANADO

Status—no notes—JTD

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

PROBATE

DATE: 04/11/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400316

CASE NAME: Maurene E. Lehner

HEARING:

Hearing re Final Discharge

COUNSEL:

PAUL EUGENE LEHNER

(PET)...STEVEN J BROWN

MAURENE E LEHNER

(DEC)...

PAUL EUGENE LEHNER

(PET)...BROWN & LIPINSKY

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge re Paul Lehner, administrator

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

1. **Need** receipts from Paul Eugene Lehner, Alaina Kahn and Lawrence M. Lehner
2. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 04/11/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601084

CASE NAME: GARY SCOTT MESTAS

HEARING:

Petition to determine succession to Real Property

COUNSEL:

MARY WATKINS	(PET)...CHARLES K. MILLS
GARY SCOTT MESTAS	(DEC)...
BRYAN C HARTNELL	(TP)...

GENERAL INFORMATION

Continued from 01/10/18.

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Mary Watkins, mother/administrator

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

1. Court appointed Mary Watkins (mother) administrator with full authority on 03/08/17, \$137,000 bond. Note: letters have not been issued.
2. Petitioner seeks 100% interest in decedent's 100% interest; in real property per the will.
3. Notice of hearing and proof of service filed 01/02/18. Addresses of daughters: Erica Rivas, Rita Rivas, Rebecca Rivas, and Tawny Rivas are unknown.
 - a. Due Diligence Declarations as to Erica and Rita previously filed 01/17/17.
JTD
 - b. **Need** Due Diligence Declarations as to Rebecca and Tawny.
4. No proposed order submitted.

RECOMMENDATION

Need to clear note #3. Court's discretion.

(lh)

Future Hearing: 5/16/18 Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 04/11/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601160

CASE NAME: JAY HOWARD GARDNER

HEARING:
Accounting Review

COUNSEL:

FRANCES GARDNER (PET)...NATALIE A ALVARADO
JAY HOWARD GARDNER (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Frances Gardner,
Administrator

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

1. Frances Gardner [daughter] was appointed administrator with full authority, no bond, on 02/01/17.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting and status report.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 04/11/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700806

CASE NAME: WENXIANG TIAN

HEARING:

FINAL DISTRIBUTION Account and Report of JIE ZHAO-WILLSEY and
Petition for allowance of fees filed.

COUNSEL:

JIE ZHAO-WILLSEY (PET)...KEVIN CHIU
WENXIANG TIAN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Waiver of Account and Report and Petition for
Final Distribution and Fees by Jie Zhao-Willsey, administrator/daughter

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

1. Assets on hand: \$320,000, real property only
2. Petitioner waives statutory fees.
3. Attorney requests statutory fees at the reduced amount of \$8,855.
Calculated.
4. All heirs waive accounting and notice.
5. ~Proposed Order: 03/22/18

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing of receipts and final
discharge to include informal account re reserves for **04/17/19**.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/11/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700874

CASE NAME: JOSEPH LUIS NAVARRO

SEE ALSO 7 8

HEARING:

Petition for Recovery and Possession of Estate Personal
Property; for Interest etc

COUNSEL:

MATTHEW LUIS NAVARRO (PET)...DAVID L. HUGHES
JOSEPH LUIS NAVARRO (DEC)...
LORENNNA L NAVARRO (PET)...LAW OFFICES OF JON J UDEWITZ

Waiver of Court Fees and Costs filed by LORENNNA L NAVARRO is GRANTED

Currently under review by legal research.

(LR)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/11/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700874

CASE NAME: JOSEPH LUIS NAVARRO

SEE ALSO 6 8

HEARING:

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

COUNSEL:

MATTHEW LUIS NAVARRO (PET)...DAVID L. HUGHES
JOSEPH LUIS NAVARRO (DEC)...
LORENN L NAVARRO (PET)...LAW OFFICES OF JON J UDEWITZ

Waiver of Court Fees and Costs filed by LORENN L NAVARRO is GRANTED

See next matter #8.

(lh)

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

DATE: 04/11/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700874

CASE NAME: JOSEPH LUIS NAVARRO

SEE ALSO 6 7

HEARING:

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

COUNSEL:

MATTHEW LUIS NAVARRO	(PET)...DAVID L. HUGHES
JOSEPH LUIS NAVARRO	(DEC)...
LORENNAL NAVARRO	(PET)...LAW OFFICES OF JON J UDEWITZ

GENERAL INFORMATION

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

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

Continued from 03/20/18. Mr. Udewitz informs the Court that his client filed an objection and competing petition on 03/07/18. Counsel to vacate the trial and continue all pending matters to 04/11/18. Hearing continued at request of Counsel to have petitions heard on the same day. Objections to be filed on or before 04/10/18.

THIS CASE SET FOR HEARING ON

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

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

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

Petition #1 by Mathew:

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

5. **Objections by Lorena L. Navarro filed 03/07/18.**
6. **Reply to Objections filed by Matthew Navarro.**

Petition #1 by Lorena:

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

RECOMMENDATION for Petition #1 by Mathew

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

RECOMMENDATION for Petition #2 by Lorena

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

(ww/nb/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/11/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700896

CASE NAME: CHRISTINE BROWN SPECIAL NEEDS TRUST DATED:11-28-16

HEARING:

Petition for Void or terminate trust or replace trustee of fraudulently established trust

COUNSEL:

CHRISTINE BROWN (PET)...RONALD W ASK
CHRISTINE BROWN SPECIAL NEEDS TRUST (TRU)...

Waiver of Court Fees and Costs filed by CHRISTINE BROWN is GRANTED

Currently under review by legal research.

(LR)

Notice was given.

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

DATE: 04/11/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701061

CASE NAME: MTR OF JUDIE L REEDER
REASSIGNED FROM DEPT S35; SEE ALSO 9B

HEARING:
Petition for Spousal Property

COUNSEL:

JONNI JOSWICK-TERRY (PET)...PATTERSON LAW FIRM, APC
JUDIE L REEDER (DEC)...
DARREN E REEDER (PET/TP)...THOMAS W DOMINICK

XREF: PROPS1700975 MTR OF DAVID HAROLD REEDER
GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Darren E. Reeder, Administrator of Estate of David H. Reeder (post-deceased spouse)

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

1. Petitioner, Darren E. Reeder, seeks court confirm his half of community property and determine that decedent's half transfers to petitioner without administration.
2. Petitioner alleges decedent and spouse, David Reeder, acquired title to subject real property on 10/04/1989, taking title as unmarried persons as joint tenants. On 05/04/92, David Reeder quitclaimed property to decedent. On 07/04/96, decedent and David Reeder were married. Decedent died on 12/04/08. No legal proceedings were instituted to terminate the marriage or determine rights of parties to their property.
3. Petitioner alleges under laws of intestacy, a one-half interest in real property passed to David Reeder. However, it appears real property is decedent's separate property. **Need** verified supplement clarifying how subject real property is community property. **JTD**
4. **Need** Notice of Hearing with proof of service.
5. ~Proposed Form Order: 02/21/18

RECOMMENDATION:

Need to clear notes 3-4 then Court's discretion.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 9B ADD-ON

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

DATE: 04/11/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701061

CASE NAME: MTR OF JUDIE L REEDER
REASSIGNED FROM DEPT S35; SEE ALSO 9A

HEARING:

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

COUNSEL:

JONNI JOSWICK-TERRY (PET)...PATTERSON LAW FIRM, APC
JUDIE L REEDER (DEC)...
DARREN E REEDER (PET/TP)...THOMAS W DOMINICK

XREF: PROPS1700975 MTR OF DAVID HAROLD REEDER

GENERAL INFORMATION:

**Continued from 02/07/18. Court notes there is a related case PROPS1700975.
Court reassigned this case to S36.**

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Jonni-Joswick-Terry, sister

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

1. Petitioner alleges all heirs waive bond; however, need bond waivers from John L. Joswick (father) and Darren Reeder (administrator of Estate of David H. Reeder). Estimated net value of estate is \$200,000 Court also has discretion to require bond per Pr. C. § 8481(b). **JTD**
2. Decedent Judie L. Reeder died intestate on 12/04/08 and was survived by her spouse, David H. Reeder, who later died intestate on 07/13/17.
3. No proposed Order submitted.

RECOMMENDATION:

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

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

DATE: 04/11/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701074

CASE NAME: FAYE ELISE GOODMAN

HEARING:

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

COUNSEL:

BARBARA LEE LANTZ (PET)...LAW OFFICE OF SOLOMON A. CHEIF
FAYE ELISE GOODMAN (DEC)...

GENERAL INFORMATION:

Continued from 01/24/18 to clear probate notes.

THIS CASE IS SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Barbara Lee Lantz, executor/daughter

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

1. Will waives bond. Estimated net value of estate is \$435,000 consisting of \$10,000 cash and remainder in real property. The court may for good cause require that a bond be given, either before or after issuance of letters (Prob. Code, § 8481(b)). JTD
2. Codicils are partially holographic. **Need** proof of holographic instrument.
3. **Need** Proof of Publication.
4. No proposed Order submitted.

RECOMMENDATION:

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

(lh)

Superior Court of Calif, County of San Bernardino
Page: 10A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 04/11/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601184

CASE NAME: EDGAR DOYLE SHUPE

HEARING:

First Summary of Account and Report of JAMES L SHUPE and Petition for allowance of fees filed.

COUNSEL:

JAMES L SHUPE (PET)...PRO/PER
EDGAR DOYLE SHUPE (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First Summary of Account by JAMES L SHUPE

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

1. Accounting period: 10/16/16 to 02/28/18
2. Assets on hand: \$282,329.05
3. Petition is not clear as to whether this is a first account current or first and final account and petition for distribution.
4. Statutory fees are note requested.
5. **Need** bank/investment statements verifying date of death balances **and** final ending balance per Local Rule 20-908.
6. Schedule E Assets on hand only includes cash assets of \$12,129.05. **Need** verified supplement itemizing all property on hand and carrying value of each.
7. **Need** verified supplement indicating if cash has been invested and maintained in an interest bearing account. Pr.C.§ 1064(a)(5).
8. **Need** verified supplement which includes addresses of beneficiaries receiving real property.
9. **Need** findings re: sole and separate property.
10. **Need** statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary. Pr. C. § 1064 (a)(4). **Need** verified supplement.
11. There are 3 creditor's claims filed 02/21/18 from heirs: James J. Shupe for \$3,000.24; Barbara Garcia for \$7,233.23; and Laura Shupe for \$27,107.28,

which appear to be requests for reimbursement of administrative expenses regarding funeral expenses, filings fees, home equity payoff, property taxes, and outstanding credit card payments. **Need verified supplement clarifying expenses and request for reimbursement.**

12. **Need** statement regarding notice to Director of Health Care Services or notice per Pr. C. § 9202(a). Need verified supplement.
13. **Need** statement regarding notice to California Victim and Compensation and Government Claims Board or notice per Pr. C. § 9202(b). Need verified **supplement.**
14. **Need** statement regarding notice to Franchise Tax Board or notice per Pr. C. § 9202(c)(1).
15. There is no distribution clause. **Need same.**
16. **Report is not verified. Need same.**
17. **Need notice of hearing and proof of service to Charles Shupe, Barbara Haynes, Robert Shupe, Paul Shup and Laura Shupe.**
18. Proposed order includes findings not requested within petition. Proposed Order is not complete within itself without reference to petition on which it's based. Need corrected proposed order in compliance with Local Rule 20-614.

RECOMMENDATION:

Accounting does not comply with Pr. C. §1060 et seq, Need proper, complete accounting to be set on first check calendar no sooner than **05/30/18, or later Wednesday calendar.**

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 04/11/18 TIME: 8:35 DEPT: S36P

CASE#: TRU PS1800045

CASE NAME: THE HERRERA FAMILY TRUST

HEARING:

Petition to Determine Interest in Property

COUNSEL:

BERNADETTE M LAYVAS (PET)...DENNIS M SANDOVAL
THE HERRERA FAMILY TRUST (TRU)...

Currently under review by legal research.

(LR)

Notice is complete.

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

CONSERVATORSHIPS

DATE: 04/11/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS0900248

CASE NAME: MICHAEL WYHOWANEC

HEARING:

Accounting Review

COUNSEL:

KIMBERLY L. TRAUT	(PCR)...CARROLL M LAWSON
MICHAEL WYHOWANEC	(PCE/CEP)...MARK J. FLORY
MARK J. ANDREW FLORY	(PET)...JAMES B CHURCH & ASSOCIATES
KIMBERLY L. TRAUT	(CPE)...HARTNELL LAW GROUP
MARK J ANDREW FLORY	(PET)...MARK J. ANDREW FLORY
LIBERTY MUTUAL INSURANCE	(TP)...PRO/PER

GENERAL INFORMATION

Continued from **06/22/17 and 07/12/17.**

Continued from **09/20/17 to file accounting.**

Continued from **12/13/17 and 02/28/18. Additional time needed to file accounting.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 5th Waiver of Account for Tracy West, mother, approved on 10/19/16.
2. **Need** 6th Account beginning with 01/10/16.

RECOMMENDATION

Inquire status of accounting.

(lc/ww/lh)

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

DATE: 04/11/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700006

CASE NAME: JOSEPH ALEXIS VERA

HEARING:
Petition for Appointment of Conservator

COUNSEL:

HECTOR GERARDO VERA (CP)...PRO/PER
JOSEPH ALEXIS VERA (CTP)...PRO/PER

GENERAL INFORMATION

Continued from **02/21/17**. Ex Parte orders granted. Due to the disposition of a pending criminal matter, all prior estate powers are revoked. The guardian ad litem will work with the proposed conservator to clear the probate notes. Notice given by guardian ad litem, Roth.

Continued from **05/02/17**. Hector Vera is allowed to apply and obtain a passport for Joseph Alexis Vera. It is noted that dementia powers are not being requested for Joseph Vera. All existing temporary orders shall remain in full force and effect until 07/18/17. Temporary letters to continue in full force and effect.

Continued from 07/18/17. Non-appearance by Hector Gerardo Vera not has required documents been filed. The court directs the temporary conservator, Hector Vera to bring the proposed conservatee Joseph Vera to court on 09/19/17.

Continued from 09/19/17 for petitioner to clear notes. All temporary orders/letters to remain in full force and effect. Court orders Hector Vera to personally be present at next hearing.

Continued from 11/14/17. Notice to be given by Mitchell Roth.

Continued from 12/27/17. Court orders Hector Gerardo Vera to be personally present in Court on **02/14/18 at 9:30AM in Dept S36**. Notice given by Judicial Assistant.

Continued from 02/14/18 at request of petitioner. Attorney waives citation.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person by Hector Vera, father.

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

1. No bond – person only.

2. Petition, sections 3f re due diligence is incomplete and missing attachments; section 5c indicates proposed conservatee suffers from dementia, but supplemental information indicates proposed conservatee suffers from schizophrenia; and CI referral indicates proposed conservatee is currently incarcerated. **Need** further clarification via verified supplement.
3. Petitioner seeks medical powers. **Need** Medical Capacity Declaration with Dementia Attachments.
4. Petitioner requests dementia powers; **Need** appointment of counsel and report by same.
5. Confidential Supplemental Information form, sections 5f (other alternatives); 6a(2) and 6a(3) re social services and estate management services are incomplete. **Need** verified supplement.
6. Notification to Court of Conservatorship Address, "Completed By" Section is incomplete. **Need** complete form.
7. **Need** Notice of Hearing with proof of service.
8. Court Investigator's Report filed 02/15/17
9. Report by GAL, Mitchell I Roth, filed 02/21/17.
10. Certificate of Completion re Conservatorship Class filed 01/10/17.
11. No proposed order/letters. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 2-7. If approved, set hearing for Compliance Review for **11/14/18** 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/lh)

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

DATE: 04/11/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700286

CASE NAME: MTR OF ASHLEY LORIA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of BLANCA LORIA

COUNSEL:

BLANCA LORIA	(CP)...PRO/PER
JONATHAN LORIA	(CP)...PRO/PER
ASHLEY LORIA	(CTP)...CRAIG M PARKER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Blanca Loria (mother) and Jonathan Loria (brother) appointed Limited Co-Conservators of the person on 09/06/17.
2. **Need** Notification of Conservatee's rights per Pr. C. §1830(c).
3. **Need** a Determination of Conservatee's Appropriate Level of Care per Pr.C.§ 2352.5 (form GC-355).
4. **Need** Care Plan in accord with Pr. C. §2352.5.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 04/11/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700445

CASE NAME: NOHEMY BECERRA

HEARING:
Petition for Appointment of Conservator

COUNSEL:

MARIA H BACERRA (CP)...PRO/PER
NOHEMY BECERRA (CTP)...PRO/PER

GENERAL INFORMATION

Continued from 01/10/18 to clear probate notes. Notice to be given by Attorney Sandy Turner.

Continued from 02/28/18. Counsel waives return of citation and clears note #6. Need IRC report. Notice to be given by Attorney Sandy Turner.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Maria Becerra (sister)

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, and make decisions re education. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Proposed conservatee is developmentally disabled. Report of Counsel Turner filed 01/04/18.
4. Petitioner seeks medical powers. **2nd Amended Capacity filed 04/02/18. Physician's signature is not dated on first page; however, signature is dated on the last page.**
5. Proposed conservatee is developmentally disabled. **IRC report filed 02/27/18 and 03/13/18.**
6. CI Report filed 01/03/18.
7. Notice of Hearing filed 12/21/17.
8. Proof of Completion of the Conservatorship Training Class filed 01/04/18.

9. ~Proposed Form Order: 12/07/17

RECOMMENDATION

Court's discretion. If approved, set hearing for Compliance Review for **11/14/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh)

Superior Court of Calif, County of San Bernardino
Page: 16 add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 04/11/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800065

CASE NAME: JOHNNY JUSTIN ROMERO

HEARING:
Petition for Appointment of Conservator

COUNSEL:
EMMA J ROJAS (PET)...PRO/PER
JOHNNY JUSTIN ROMERO (CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Emma Rojas, 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, and make decisions re education.
2. Conservatee's civil rights not be limited without court order. JTD
3. Petitioner seeks medical powers. **Need** Capacity Declaration.
4. Proposed conservatee is developmentally disabled. **Need** appointment of counsel for report.
5. List of required contacts is missing Gloria Romero (pgm), Maria Viilamil (mgm) and Jaylene Romero (sister). **Need** completed form.
6. Proposed conservatee is developmentally disabled. **IRC Letter filed requesting continuance. Suggest Court continue to 05/30/18 or later Wednesday calendar.**
7. Proof of Completion of the Conservatorship Training Class filed.
8. CI Report filed 04/06/18.
9. Return of Citation filed 03/14/18.
10. ~Proposed Form Order: 03/09/18

RECOMMENDATION

Court's discretion re continuance to 05/30/18 or later Wednesday calendar.

Need to clear notes #3-5. If approved, set hearing for Compliance Review for **11/14/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh)

CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **PROBATE**

DATE: 04/11/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1300689

CASE NAME: Joanne L. De Loof

HEARING:

Report Account and Report of RICHARD DE LOOF and Petition for allowance of fees filed.

COUNSEL:

RICHARD DE LOOF	(PET)...CHRISTOPHER JAMES MURTAGH
JOANNE L DE LOOF	(DEC)...
JUDITH L JORDAN	(TP)...PRO/PER

Waiver of Court Fees and Costs filed by RICHARD DE LOOF is GRANTED

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Amended Final Account and Report by Richard De Loof, son/executor/trustee

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

1. Accounting period: 01/21/13 to 09/01/17
2. Assets on hand \$20,427.86, cash
3. **Need** bank statement verifying final ending balance per Local Rule 20-908.
4. Inventory and Appraisal is valued at \$0 and petitioner alleges the only asset is an ongoing Texas Asbestos lawsuit. However, the Will and accounting indicate an automobile given to Amanda De Loof at \$2,000.
 - a. **Amended Inventory and Appraisal filed 04/06/18 (past 2nd check deadline) not in LF at time of review.**
5. The accounting does not balance as there are no beginning assets on hand; the "vehicle" is mischaracterized as a gain, when it should be a beginning asset. Summary of Account does not comply with Pr.C.§10900 and Pr.C.§1060 et. seq.
 - a. **Need** proper summary of account and schedules. **Supplement filed 04/06/18 (past deadline to file) not in LF at time of review.**
6. Summary of Account improperly charges the estate with a "loan" received from petitioner in the amount of \$25,785.50, and credits include a "loss" of \$5,803.57

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

as remaining reimbursements owing to petitioner. It appears funds were advanced by petitioner to pay for funeral expenses and administrative expenses, and should instead be deemed a request for reimbursement of expenses as petitioner seeks approval to receive additional income until paid in full. [Acct, 2/13/18, LFpgs 5; 14-19].

a. **Need verified supplement with revised Summary of Account to exclude “loan” from charges.**

7. The estate is not in a condition to close as the Texas Asbestos Lawsuit has not yet settled. However, Executor seeks authority to sign any documentation re litigation and directly distribute to the heirs. Executor would accept conditions for damages and waive, release and transfer or accept conditions.
 - a. Question under what authority would Executor have to settle the estate without a completed inventory and appraisal, and without conclusion of litigation which comprises a majority of the estate assets? **Need points and authorities via verified supplement. Points and Authorities filed 04/06/18 not in LF at time of review. Referred to Legal Research.**
8. It appears to be a final account with proposed distribution; however, not stated in caption of petition. **Need same.**
9. Proposed distribution includes distribution directly to beneficiaries including 33.33%, each, to Richard De Loof and Judith Jordan, and 16.66%, each, to Amanda De Loof and Sharesa De Loof. However, the will distributes residue to Richard De Loof, Trustee of The Joanne DeLoof Family Trust (Judi Jordan resigned as co-trustee). Furthermore, it appears Article Eight, Section 8.01 of Trust distributes residuary to Richard De Loof and Judith Jordan in equal shares. [See Amended Acct 2/13/18, LFpg7; Petition, 8/16/13, LFpg6-7; Trust, 8/16/13, LFpg35]
 - a. Question what authority Executor has to distribute residuary directly to beneficiaries and/or to Amanda De Loof and Sharesa De Loof? **Need verified supplement with points and authorities. Supp 02/13/18 does not clear note.**
10. Schedule A “Receipts” include checks received for various Asbestos claims totaling \$20,472.86. Question the nature of these payments, and if there is a current settlement agreement? It is unclear if these are actual “receipts” or cash assets from litigation. **Need proper summary of account with schedules.**
11. Schedule B Disbursements include attorney’s fees of \$5,200 paid to attorney Carolyn Schauf. Question the authority to pay probate statutory fees without prior approval Pr.C. § 10813? **Supp 02/13/18 alleges Petitioner initiated probate proceedings in pro per and was charged a flat fee for assistance in completing petitions, supplements and court appearances which became more complex with asbestos lawsuit. Petitioner alleges estate funds were not used, although petitioner requests reimbursement of said fees. Need itemization of attorney’s fees, if seeking approval of extraordinary fees.**
12. **Need** notice of hearing and proof of service to Richard De Loof in his capacity as trustee.
13. Proposed Order not reviewed due to deficiencies.

RECOMMENDATION

Need to clear notes 3-12; proper accounting and notice. If approved, set hearing on the filing of final discharge for **04/17/19**.

(lh)

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

DATE: 04/11/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400008

CASE NAME: George Contreras, Sr.

HEARING:

Hearing Re: OSC RE: SANCTIONS AS TO PETITIONER AND COUNSEL

COUNSEL:

JESS CONTRERAS (PET)...KELLY L PEXTON
GEORGE CONTRERAS Sr. (DEC)...

XREF: PROPS1100601 GEORGE CONTRERAS & **PROPS1300500** GEORGE CONTRERAS
SR

GENERAL INFORMATION

Continued from **10/19/16** and **12/21/16**. No appearance. Jess Contreras ordered to be present if notes not cleared.

Continued from 03/15/17, 05/24/17 and 07/26/17.

Continued from 09/20/17. No appearance. Jess Contreras and/or Kelly Pexton are ordered to be present at next hearing if final discharge is not filed. Notice given by Judicial Assistant.

Continued from 11/22/17. No appearance. Court orders Jess Contreras and Kelly Pexton to be present at next hearing. OSC re Sanctions as to both Jess Constreas and Kelly Pexton set for their non-appearance/failure to file final discharge.

Continued from 01/31/18 at request of Court. Declaration with cancelled checks to be filed. Petitioner ordered to be present at next hearing.

THIS CASE SET FOR HEARING ON **OSC Re Sanctions/Final Discharge**.

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

1. Final account/distribution of Jess Contreras approved on 10/27/15.
2. **Need** receipts for George and Georgette.
3. **Need** Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§ 11753(b).
4. **Need** declaration with cancelled check per 01/31/18 minute order.

RECOMMENDATION

Inquire status of receipts and discharge. When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with C.C.P. §§ 128 & 1209.

(lc/ww/lc/lh)

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

DATE: 04/11/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400778

CASE NAME: MTR OF THE MARTIN F STONER AND DARLEEN K STONER

SEE ALSO 4 7

HEARING:

Hearing Re: RECEIPT OF SETTLEMENT

COUNSEL:

RENE ABRAHAM (PET)...DONNASUE ORTIZ
THE MARTIN F STONER AND DARLEE STONER TRUST (TRU)...
DARLEEN STONER (PET)...LAYNE A BARTHOLOMEW
MEISHYAN JOSEPHINE CHENG (OBJ)...MARK F VON ESCH

XREF: PROPS1500839 *MARTIN F. STONER*

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON RECEIPT OF SETTLEMENT

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

1. Matter set on 01/31/18. Parties informed Court matter settled prior to mediation. Settlement includes approval of accounting.
2. **Need** Settlement Agreement.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 04/11/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400778

CASE NAME: MTR OF THE MARTIN F STONER AND DARLEEN K STONER

SEE ALSO 3 7

HEARING:

First and Final Account and Report of RENE ABRAHAM and Petition
for allowance of fees filed.

COUNSEL:

RENE ABRAHAM (PET)...DONNASUE ORTIZ
THE MARTIN F STONER AND DARLEE STONER TRUST (TRU)...
DARLEEN STONER (PET)...LAYNE A BARTHOLOMEW
MEISHYAN JOSEPHINE CHENG (OBJ)...MARK F VON ESCH

XREF: PROPS1500839 *MARTIN F. STONER*

GENERAL INFORMATION:

**Continued from 01/31/18. Parties report matter settled prior to mediation.
Settlement includes approval of accounting. Matter continued for settlement
agreement to be filed.**

THIS CASE IS SET FOR HEARING ON First Account Current and Petition and Report
and Petition for Fees by Rene Abraham, Successor Trustee/Executor

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

1. Accounting period: 04/17/14 to 10/13/17
2. Assets on hand: **\$381,101.39**, cash; **\$87,500**, 50% interest in real property in Hawaii.
3. Petitioner has combined both the probate estate and trust estate into one accounting, alleging all assets were transferred into the trust on or about 04/29/15. However, it appears only the real property in Pomona, CA, was deemed to be a trust asset. Court to inquire if there are separate assets in the probate estate involving ongoing assets. Court to determine if there should be two separate accountings. **JTD**
4. Petitioner initially retained Attorney Charles Althouse to represent her in the probate in Los Angeles County Court, who was substituted in October, 2015 for Donnasue Smith Ortiz. Attorney Althouse requests payment of

- \$25,713.20** for extraordinary services regarding the contested issues at the beginning of the probate action. Itemized. [Acct, 11/20/17, LFpgs28-41]. **JTD**
5. Attorney Donnasue Smith Ortiz requests **\$36,887.50** for attorney's fees and **\$562.50** for reimbursement of costs to be paid by trust assets as there are no probate fees. Itemized. [Acct, 11/20/17, LFpg44]. **JTD**
 6. Petitioner requests compensation in the amount of **\$152,445** out of the Trust Estate on account as her due compensation. Itemized. [Acct, 11/20/17 LFpg61-77]. **JTD**
 7. **Need** Notice of Hearing and Proof of Service.
 8. **Need settlement agreement.**
 9. No proposed Order submitted.

RECOMMENDATION:

Need to clear notes #7-8.

If approved, court to set next accounting review for **12/12/18**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

(lh)

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

DATE: 04/11/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400897

CASE NAME: Faye Quesada Carrera

HEARING:
Accounting Review

COUNSEL:

CORRINE C GARCIA	(PET)...JACK B OSBORN
FAYE QUESADA CARRERA	(DEC)...
CORINNE C. GARCIA	(PET)...MARK J. ANDREW FLORY
JANET VASQUEZ	(TP)...ELISABETH KEMPE-OLINGER
BRYAN C. HARTNELL	(HARTNELL LAW GROUP)

GENERAL INFORMATION

Continued from 01/31/18 to file accounting.

THIS CASE IS SET FOR HEARING ON Accounting Review re Corrine Garcia,
daughter

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

1. Letters of Administration issued to Corrine Garcia on 06/03/15, limited authority and \$20,000 bond. Proof of blocked account filed 10/06/17.
2. Court approved Status Report on 05/31/17.
3. No accounting or status report of administration. Need same.

RECOMMENDATION

Inquire status

(lh)

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 04/11/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500217

CASE NAME: CHARLINE MCFARLING

HEARING:
Accounting Review

COUNSEL:

COLLIN CHARLES MUNRO	(PET)...GARY H BLAYLOCK
CHARLINE MCFARLING	(DEC)...
BRANDON MUNRO	(PET)...NANCY E LOFDAHL

GENERAL INFORMATION

Continued from **05/24/17**. Counsel Gary Blaylock ordered to prepare an accounting to the best of his ability as he is unable to find his client.

Continued from 10/18/17. No appearance. Court orders Collin Charles Munro and/or his Counsel of record to appear at the next hearing.

Continued from 12/06/17 at request of Counsel to clear probate notes.

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to **Collin Munro**, son, on 09/14/15; full authority, no bond. Collin was removed as administrator on 10/19/16. **Brandon Munro**, son was appointed temporary, then later successor administrator and letters issued 03/06/17.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting by Gary Blaylock for Collin Munro Pr.C. § 10953.

RECOMMENDATION

Need to clear notes 2 & 3.

(lc/ww/lc/ww/lh)

Future Hearing: 05/14/18 Accounting Review for **Brandon Munro**

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

DATE: 04/11/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500839

CASE NAME: MARTIN F. STONER

SEE ALSO 3 4

HEARING:

Accounting Review

COUNSEL:

MEISHYAN JOSEPHINE CHENG	(PET)...VON ESCH & VON ESCH
MARTIN F. STONER	(DEC)...
RENE ABRAHAM	(PET)...DONNASUE ORTIZ
ROBERTA LYNN SHEIR	(TP)...ALBREKTSON & SHUMATE
DARLEEN STONER	(LAYNE A BARTHOLOMEW)

XREF: PROPS1400778 *MTR OF THE MARTIN F STONER AND DARLEEN K STONER*

GENERAL INFORMATION

Continued from **10/06/16** trailing status reports in PROPS1400778

Continued from **01/19/17 and 04/13/17**. Discussions re settlement continue.

Continued from **08/03/17** at request of Counsel.

Continued from 11/07/17. Ms. Ortiz reports that formal Inventory and Appraisal has not been filed as assets were determined to be assets of the Trust in PROPS1400778.

Continued from 01/31/18 at request of Counsel to trail PROPS1400778 which has settled.

THIS CASE IS SET FOR HEARING ON Accounting Review re executor Rene Abraham

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

1. Rene Abraham was appointed Special Administrator on **05/22/14** in Los Angeles County Superior Court and Letters Testamentary with full authority were issued 07/31/15; no bond.
2. While probate was pending in Los Angeles County, petitioner, Rene Abraham, petitioned San Bernardino County Court to transfer real property into trust and take jurisdiction of trust. On or about **04/29/15**, parties in Los Angeles probate case and parties in San Bernardino trust action agreed for probate to be transferred to San Bernardino County, and agreed for the real property to be accounted for under the trust. The Los Angeles County

probate case was transferred to San Bernardino County on 09/11/15, amended letters issued 11/17/15.

3. It appears decedent owned a collection of valuable antiques and plants. It remains to be determined who the beneficiaries are of the estate. Question if the antiques, plants, and/or other property are assets of the trust? **Need verified supplement.**
4. **Need** separate accounting as to the probate estate.

RECOMMENDATION

Inquire status of separate accounting re probate estate.

(lh)

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

DATE: 04/11/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600597

CASE NAME: DAVID A BROWN SPECIAL NEEDS TRUST

SEE ALSO 9 14

HEARING:

Hearing Re: STATUS REVIEW

COUNSEL:

BARBARA HARRISON	(PET)...JEANNE E KENNEDY
DAVID A BROWN SPECIAL NEEDS TRUST (TRU)...	
JEANNE E KENNEDY	(PET)...CALDWELL, KENNEDY & PORTER
DAVID A. BROWN	(BEN)...DONNASUE ORTIZ
KIM HARRISON BROWN	(PET)...DENNIS M SANDOVAL
LARRY E HOOVER	(STE)...

GENERAL INFORMATION

Continued from 10/04/17 at request of counsel to trail accounting hearing set. Counsel notes Kim Harrison-Brown's (spouse) accounting is as to the joint bank account she has with David Brown. Ms. Ortiz informs the Court this account is involved in a family law action in Texas. Court informs counsel: should bills not be paid by Kim Harrison-Brown the account may be taken into the trust.

Continued from 01/29/18. Court signed order after hearing of 04/12/17 ordering Kim Harrison Brown's name be removed from Union Bank account and Larry Hoover to take control of account. Counsel report Casa Colima Facility has not been paid in 2 months. Court ordered Mr. Hoover to pay Casa Colima as soon as possible. Ms. Kim Harrison Brown ordered to reimburse Mr. Hoover. Court orders Kim Harrison Brown's accounting be from 08/15/17 to current and for Kim Harrison Brown to be present at next hearing (CourtCall acceptable).

THIS CASE SET FOR HEARING ON Status Review.

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

1. On 07/12/17 Larry Hoover was re-appointed as trustee of Special Needs Trust; Bond of \$1,000,000. Order regarding payment of care facility bills signed.
2. Accounting reviews were set. See other matters 9 and 14.
3. Inquire status of reimbursement to Mr. Hoover, payment to Casa Colima, and Union Bank Account.

RECOMMENDATION
Court's discretion.

(lc/cs/lh)

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

DATE: 04/11/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600597

CASE NAME: DAVID A BROWN SPECIAL NEEDS TRUST

SEE ALSO 8 14

HEARING:

Hearing Re: ACCOUNTING REVIEW (BARBARA HARRISON)

COUNSEL:

BARBARA HARRISON	(PET)...JEANNE E KENNEDY
DAVID A BROWN SPECIAL NEEDS TRUST (TRU)...	
JEANNE E KENNEDY	(PET)...CALDWELL, KENNEDY & PORTER
DAVID A. BROWN	(BEN)...DONNASUE ORTIZ
KIM HARRISON BROWN	(PET)...DENNIS M SANDOVAL
LARRY E HOOVER	(STE)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Kim Harrison Brown

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

1. Court ordered accounting by Kim Harrison Brown for accounting period 08/15/17 to current.
2. **Need** accounting.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 04/11/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600797

CASE NAME: DONALD RAYMOND GABBARD

HEARING:

Accounting Review

COUNSEL:

BETSY MOORE

(PET)...THEODORE P BERTIER

DONALD RAYMOND GABBARD

(DEC)...

GENERAL INFORMATION

Continued from 01/10/18 at request of Court. Amended Inventory and Appraisal to be filed. Court discussed storage claim and sale of house with Counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review re Betsey Moore, administrator

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

1. Letters of Administration with full authority issued to Betsey Moore, \$275,000 bond.
2. **Amended** final Inventory and Appraisal filed 04/06/18 not in LF at time of review.
3. No accounting or status report of administration. Need same.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 04/11/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700947

CASE NAME: MTR OF HOWARD BURTON IMMERMANN

HEARING:

Petition for to Revoke Probate Petition

COUNSEL:

RONNIE HYMAN	(PET)...LEANN E MAILLIA
HOWARD BURTON IMMERMANN	(DEC)...
ROSALIE GREENBERG	(PET)...PRO/PER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for to Revoke Probate Petition by Rosalie Greenberg, partner of decedent

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

1. Petitioner Rosalie Greenberg seeks Court to revoke petition of Ronnie Hyman as administrator of the estate.
2. Petitioner alleges she is the "common law wife" of decedent, Howard Burton Innerman. That she and decedent have lived in the same residence in Victorville California, the property which administrator seeks to evict petitioner from.
3. Petitioner alleges she has made all payments on the mortgage of the real property since his death on 05/04/17; that she and decedent made payments on the mortgage through their joint checking account with Union Bank; that she and decedent have lived as husband and wife, and she is listed on his retirement account as decedent's spouse. Bank statements attached. [Petition, 02/15/18, LFpg5-7].
4. Petition does not cite authority under which relief is sought. **Need** amended petition and caption to include reference to applicable probate code section per Local Rule 20-601.
5. Notice was given.
6. No proposed order submitted.

RECOMMENDATION

Need to clear note #4. Suggest petitioner to seek Counsel.

(lh)

Future Hearing: 3/27/19 Accounting Review

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

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

DATE: 04/11/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700979

CASE NAME: DONALD EUGENE HARRINGTON

HEARING:

Spousal Property Petition hearing.

COUNSEL:

TASHA HARRINGTON (PET)...PRO/PER
DONALD EUGENE HARRINGTON (DEC)...

GENERAL INFORMATION

Continued from 01/31/18. Court determined Donald Harrington passed away 02/25/17. Court ordered supplement clarifying how home became community property and why decedent was planning to adopt petitioner's adult children.

THIS CASE IS SET FOR HEARING ON Spousal Property Petition

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

1. Petitioner requests determination of decedent's property passing to the surviving spouse without administration and confirmation of property belonging to the surviving spouse.
2. Decedent died intestate on 02/25/17 and is survived by a spouse, 3 adult biological children, and 2 stepchildren who allegedly would have been adopted by decedent but for a legal barrier.
3. Petitioner alleges that she and decedent were married in 04/04/14. Decedent acquired subject real property on or about 04/09/09 with his deceased spouse, which was held as Joint Tenants and as community property. Decedent executed an Affidavit Death of Joint Tenant on 02/01/13. Petitioner alleges she is decedent's next of kin.
4. It appears the real property is decedent's separate property and decedent's issue would also share a 2/3 distribution of the estate per Pr. C. §6401.
5. **Need verified supplement clarifying how home became community property and why decedent was planning to adopt petitioner's adult children.**
6. Notice was given.
7. ~Proposed form order: 10/02/17

RECOMMENDATION:
Need to clear note #5.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 13

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

DATE: 04/11/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1500586

CASE NAME: ANGELINE P. TSEKO REVOCABLE TRUST

HEARING:

Motion Re: NOTICE OF MOTION TO TAX COSTS DECLARATION OF GEORGE
TSEKO AND MEMORANDUM ETC Filed by Petitioner GEORGE TSEKO

COUNSEL:

ANGELINE P. TSEKO REVOCABLE TRUST (TRU)...
GEORGE TSEKO (APP)...JOHN M WOODBURN
ANTOINETTE FERNANDEZ (STE)...JENNIFER M DANIEL

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN,

Currently under review by legal research.

(LR)

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

DATE: 04/11/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1600597

CASE NAME: DAVID A BROWN SPECIAL NEEDS TRUST

SEE ALSO 8 9

HEARING:

First and final Account and Report of BARBARA HARRISON and
Petition for allowance of fees filed.

COUNSEL:

BARBARA HARRISON	(PET)...JEANNE E KENNEDY
DAVID A BROWN SPECIAL NEEDS TRUST (TRU)...	
JEANNE E KENNEDY	(PET)...CALDWELL, KENNEDY & PORTER
DAVID A. BROWN	(BEN)...DONNASUE ORTIZ
KIM HARRISON BROWN	(PET)...DENNIS M SANDOVAL
LARRY E HOOVER	(STE)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Report of SNT
and Petition for Attorney Fees Rendered to Former Co-Trustee of SNT by Barbara
Harrison, former Co-Trustee

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

1. Accounting period: 12/05/12 to 07/07/17
2. Assets on hand: \$992,003.35, consisting of \$8,006.09 and remaining in equities, fixed income and securities
3. Attorney requests fees of \$25,206.25 less \$8,973.03 previously paid for a total of **\$16,233.22** for 109.10 hours, plus an anticipated 2.0 hours at the rate of \$300/275 for attorney services and \$150/\$125 for paralegal services. Itemized [Acct, 2/7/18, LFpgs 14-21]. **JTD**
4. Petitioner waives compensation; however, requests reimbursement of \$4,299.28 for paid attorneys' fees and \$812.12 for costs re filing fee, mileage and CPA, for a total of **\$5,111.40**. **JTD**
5. Schedule C Disbursements include a cash withdrawal to Kim Brown for \$5,000, a \$20,000 cash transfer to acct ending in x 0490, over \$46,000 in cash transfers to community account x5478 without any description other than to support the family. Does Court wish to require further itemization? [Acct, 2/7/18, LFpg4, 36-38] **JTD**

6. Notice was given.
7. Current bond: \$1,000,000, appears sufficient.
8. No proposed Order submitted.

RECOMMENDATION:

Court's discretion. If approved, court to set hearing re receipts and final discharge **04/17/19.**

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/11/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700458

CASE NAME: MARIE T. KNOTT LIVING TRUST

SEE ALSO 15A, 15B, 15C, 15D, 15E

HEARING:

Petition for bring trust under court supervision and to permit
the successor trustee to purchase life ins

COUNSEL:

SHRINERS HOSPITALS FOR CHILDREN (PET)...KEITH L MEEKER

MARIE T KNOTT LIVING TRUST (TRU)...

ALBERT KNOTT (PET)...L'TANYA M BUTLER

Currently under review by legal research.

(LR)

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

DATE: 04/11/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700458

CASE NAME: MARIE T. KNOTT LIVING TRUST
SEE ALSO 15, 15B, 15C, 15D, 15E
HEARING:
Hearing Re: STATUS OF MEDIATION

COUNSEL:
SHRINERS HOSPITALS FOR CHILDREN (PET)...KEITH L MEEKER
MARIE T KNOTT LIVING TRUST (TRU)...
ALBERT KNOTT (PET)...L'TANYA M BUTLER

Status—no notes—JTD

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

DATE: 04/11/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700458

CASE NAME: MARIE T. KNOTT LIVING TRUST
SEE ALSO 15, 15A, 15C, 15D, 15E

HEARING:

Motion Re: Order Determining Waiver by Albert S Knott Jr., Trustee of Objections
Filed by Petitioner SHRINERS HOSPITALS FOR CHILDREN

COUNSEL:

SHRINERS HOSPITALS FOR CHILDREN (PET)...KEITH L MEEKER
MARIE T KNOTT LIVING TRUST (TRU)...
ALBERT KNOTT (PET)...L'TANYA M BUTLER

Currently under review by legal research.

(LR)

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

DATE: 04/11/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700458

CASE NAME: MARIE T. KNOTT LIVING TRUST
SEE ALSO 15, 15A, 15B, 15D, 15E

HEARING:

Petition for order requiring respondents to reimburse and restore to the Marie T Knott Living Trust

COUNSEL:

SHRINERS HOSPITALS FOR CHILDREN (PET)...KEITH L MEEKER
MARIE T KNOTT LIVING TRUST (TRU)...
ALBERT KNOTT (PET)...L'TANYA M BUTLER

Currently under review by legal research.

(LR)

Superior Court of Calif, County of San Bernardino
Page: 15D add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 04/11/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700458

CASE NAME: MARIE T. KNOTT LIVING TRUST
SEE ALSO 15, 15A, 15B, 15C, 15E

HEARING:

Petition for OBJECTIONS TO TRUSTEE'S ACCOUNT DATED 01/24/17
PETITION FOR RELIEF, SURCHARGE, AND REMOVAL ETC

COUNSEL:

SHRINERS HOSPITALS FOR CHILDREN (PET)...KEITH L MEEKER
MARIE T KNOTT LIVING TRUST (TRU)...
ALBERT KNOTT (PET)...L'TANYA M BUTLER

Currently under review by legal research.

(LR)

Superior Court of Calif, County of San Bernardino
Page: 15E add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 04/11/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700458
CASE NAME: MARIE T. KNOTT LIVING TRUST
SEE ALSO 15, 15A, 15B, 15C, 15D
HEARING:
FIRST Account and Report of ALBERT KNOTT and Petition for allowance of fees filed.

COUNSEL:
SHRINERS HOSPITALS FOR CHILDREN (PET)...KEITH L MEEKER
MARIE T KNOTT LIVING TRUST (TRU)...
ALBERT KNOTT (PET)...L'TANYA M BUTLER

GENERAL INFORMATION

Continued from 12/07/17 at request of counsel. Attempting settlement.
Continued from 01/16/18. Petitioner and Counsel not present. Matter set for Trial.
Continued from 03/15/18 at request of Court. Mediation set.

THIS CASE SET FOR HEARING ON 1st Account Current and Report of Successor Trustee Albert Knott Jr.

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

1. Albert Knott Jr. was appointed successor Trustee concurrently as Albert Knott Sr. was removed on 09/09/97; Los Angeles County.
2. Accounting period 09/09/97 – 09/30/17.
3. Assets on hand \$940,956.78 of which \$246,804.53 is cash.
4. Trustee inadvertently overpaid himself \$137,122.92 in distribution and owes the Trust. Trustee proposes to rectify overpayment by placing balance of Trust funds in a blocked account and having Trust purchase a life insurance policy of \$250,000 to have Trust beneficiary.
5. Trustee alleges that prior Trustee, Albert Sr., exhausted any liquid capital held by trust prior to abandoning his family and Trustee duties. Therefore, the only remaining asset was the real property.
6. Real property in Redondo Beach was sold 06/28/16 for \$1,300,000 and real property in Rancho Cucamonga was purchased for \$650,000.
7. **Objections filed by Shriners Hospital on 10/19/17.**
8. No proposed order. Submit after hearing.

RECOMMENDATION

Matter is contested. If approved and Court takes jurisdiction of trust, set next Accounting review for **12/13/18**.

(lc/nb/lc/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/11/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700849

CASE NAME: MARY E SHEDDEN FAMILY TRUST DATED 9/21/1995

SEE ALSO 16

HEARING:

Petition for TO DECLARE TRUST INVALID FOR UNDUE INFLUENCE & LACK
OF CAPACITY

COUNSEL:

SCOTT MCMILLAN (PET)...KLEIN, DENATALE, GOLDNER, COOPER,
MARY E SHEDDEN FAMILY TRUST (TRU)...
SALLY FLANDERS (OBJ)...KRISTINE M BORGIA

XREF: PROPS1700917 *MARIE M. MILLER FAMILY TRUST*

Currently under review by legal research.

(LR)

Notice is complete.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/11/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700917

CASE NAME: MARIE M. MILLER FAMILY TRUST DATED 9/21/95

SEE ALSO 16

HEARING:

Petition for Declaring trust invalid for undue influence & lack
of capacity pursuant to PrC 17200

COUNSEL:

SCOTT MCMILLAN (PET)...KLEIN, DENATALE, GOLDNER, COOP
MARIE M. MILLER FAMILY TRUST (TRU)...
SALLY FLANDERS (OBJ)...LESTER & CANTRELL, LLP

XREF: PROPS1700849 *MARY E SHEDDEN FAMILY TRUST*

Currently under review by legal research.

(LR)

Notice is complete.

(lh)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 04/11/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS0700057

CASE NAME: **MF** RUSSELL MACK PHILLIPS

HEARING:

SIXTH CURRENT Account and Report of LAWRENCE A DEAN II and
Petition for allowance of fees filed.

COUNSEL:

KEITH PHILLIPS	(CPE)...JAMES B CHURCH & ASSOCIATES
RUSSELL MACK PHILLIPS	(CEP/CTE)...JOAN NELMS
ROBERT HEENEY	(PET)...LINDA ROBERTS-ROSS
LAWRENCE A DEAN II	(TC/CPE)...SHERRI L KASTILAHN
LAWRENCE A DEAN	(PET)...SHERRI L KASTILAHN
VISITING ANGELS OF RIVERSIDE COUNTY	(PET)...ALLISON M DE TAL
JP MORGAN CHASE BANK N.A	(OBJ)...KEESAL, YOUNG & LOGAN

GENERAL INFORMATION

Continued from 11/13/17. The Court approves petitioner's fees in the amount of \$5,687.45 and attorney fees in the amount of \$3,255. The Court will approve Christina Erickson Taube's fees of \$2,896, but in the future the Court requests that bills and receipts for her services be filed. The Court requests receipts and detailed billing be filed as to Rolando Dizon.

Continued from 01/09/18 to clear probate notes.

THIS CASE IS SET FOR HEARING ON 6th Account Current and Petition for Allowance of Fees filed by Lawrence A. Dean, II (Petitioner/PPF/conservator)

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

1. Accounting covers period: 04/01/15 – 03/31/17
2. Assets on hand: \$630.17 in cash.
3. **Need** Summary of Account on mandatory Judicial Council Form GC-400(SUM).
4. Room and board expenses were paid to Rolando Dizon. **Need** receipt.
5. Petitioner requests fees of \$5,687.45, minus periodic payments. Billed at various rates for various services not exceeding \$105/hour. Itemized [LFpgs19-23]. As there do not appear to be sufficient funds to render fees requested, question how petitioner proposes to be compensated? Additionally, it is unclear

- the total periodic payments received as opposed to back pay of fees. **Need** verified supplement.
6. Attorney requests fees of \$3,255 for 9.30 hours at \$350 per hour. Itemized [LFpgs24-25]. As there do not appear to be sufficient funds to render fees requested, question how counsel proposes to be compensated? **Need** verified supplement.
 7. Petitioner requests authority to take periodic payments of \$150/month or up to 80% of the future fees earned. **JTD**
 8. Petitioner indicates the estate owes fees to the Conservator and attorney. Fees paid for the First and Second Account current; however, starting with third account payment made as follows:
 - a. Conservator fees awarded \$26,0904.90, fees paid \$12,150.00, fees owed \$13,944.90.
 - b. Attorney fees awarded \$24,933.75, fees paid \$6,500, fees owed \$18,433.75.
 9. Current bond is \$20,000.
 10. **Need** notice of hearing and proof of service to Court appointed Counsel.
 11. **Post-Move Notice filed 10/11/17 indicates Conservatee now resides in Riverside County. Suggest transfer. If so, Court to set control date. JTD.**
 - a. **Notice does not include E. Joan Nelms. Need proper service.**
 12. ~Proposed Order: 10/11/17

RECOMMENDATION:

Need to clear notes #3-6; 10-11. Once approved, set hearing on the next accounting review for **05/14/18** (if one year) or **05/13/19** (if two years). Account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(cs/nb/lh)

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

DATE: 04/11/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400057

CASE NAME: MTR OF BETTY JEAN MARTIN

SEE ALSO 20 21

HEARING:

Hearing Re: ACCOUNTING REVIEW OF DEBBIE KROL

COUNSEL:

LISA A BURGESS-PEEBLES	(CPE)...PRO/PER
BETTY JEAN MARTIN	(CEP)...SANDRA TURNER
MICHELE LEANN REED	(SC)...PRO/PER
DEBBIE JEANNE KROL	(SC)...PHYLLIS M GALLAGHER
SANDY TURNER	(PET)...SANDRA TURNER

Waiver of Court Fees and Costs filed by BETTY JEAN MARTIN is GRANTED
Waiver of Court Fees and Costs filed by DEBBIE JEANNE KROL is GRANTED

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Final Account of
Debbie Krol

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

1. Debbie J. Krol was appointed successor conservator of the person and estate on 06/28/17, \$75,000 bond.
2. Notice of Death of Conservatee filed 02/20/18. It appears conservatee passed away on 12/18/17.
3. **Need** final accounting for pre-death and post-death accounting periods per Pr. C. §2620.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 04/11/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400057

CASE NAME: MTR OF BETTY JEAN MARTIN

SEE ALSO 19 21

HEARING:

Hearing Re: AMENDED ACCOUNTING CURRENT AND RPT OF SUCCESSOR.

COUNSEL:

LISA A BURGESS-PEEBLES	(CPE)...PRO/PER
BETTY JEAN MARTIN	(CEP)...SANDRA TURNER
MICHELE LEANN REED	(SC)...PRO/PER
DEBBIE JEANNE KROL	(SC)...PHYLLIS M GALLAGHER
SANDY TURNER	(PET)...SANDRA TURNER

Waiver of Court Fees and Costs filed by BETTY JEAN MARTIN is GRANTED

Waiver of Court Fees and Costs filed by DEBBIE JEANNE KROL is GRANTED

GENERAL INFORMATION:

Continued from 7/12/16, 11/09/16 and 02/15/17. Court deems the 4-day lapse between the 2 conservatorships to be de minimis and will not require an amended accounting on the issue.

Continued from **07/03/17**. Counsel reports an amended inventory and appraisal to be filed reflecting the higher value of home in recent appraisal. Michelle Leann Reed is ordered to be present at next hearing. Notice by Judicial Assistant.

Continued from 09/11/17 and 11/20/17 to clear probate notes.

Continued from 01/31/18 to clear probate notes. Ms. Gallagher states she will assist Michele Reed in fixing accounting. Waiver of conflict previously filed.

THIS CASE IS SET FOR HEARING ON **AMENDED** (05/23/17) First Account Current and Petition for Fees by Successor Conservator, Michele Leann Reed.

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

1. Accounting period covers 04/15/15 (end of last accounting by prior conservator) to 04/14/17. **Does Court wish to deem accounting as First and Final Account of first successor conservator Michele Leann Reed?**
2. Final Inventory and Appraisal filed indicating value of \$145,500 at date of appointment.
3. Assets on hand: \$177,598.71, consisting of \$532.26 cash, and remaining in real property in Apple Valley, CA.

4. Petitioner does not request compensation at this time but reserves to do so at a later time.
5. Total Charges and Total Charges to Summary of Account do not match; Property on Hand at Beginning of Account Period is incorrect; and does not include personal or real property. **Supp 11/09/17 corrected Summary of Account attached; however, need Schedule E assets on hand via verified supplement.**
6. Disbursements – Schedule C requires further clarification via verified supplement as to the following:
 - a. Citi Bank – credit card payments. **Supp 11/09/17 alleges assisted living facility rent was paid with credit card, which credit card payments were made from conservatee’s checking account.**
 - b. Legalshield payments. **Supp 11/09/17 alleges a lawyer retainer service was kept at request of conservatee. This account has since been closed.**
 - c. Weber and Assoc. **Supp 11/09/17 alleges this was a payment made to a collection agency for past-due HOA dues on conservatee’s northern California property.**
7. Petition indicates Conservatee now resides in an assisted living facility. **Need residential facility statements** and/or written verification of rent per Pr.C. §2620(c)(5).
8. As Conservatee no longer reside in her home, question whether home is being rented to generate income? Need verified supplement. **Supp 11/09/17** property was in the process of being sold and therefore not leased out. Property has since been sold and revenue has been generated to support assisted living facility rent. **Question when real property was sold? Need verified supplement.**
9. Petitioner has paid for caregiver services during this account period. **Supp 11/09/17 generally describes services; however, need verified declarations to confirm dates of service, performance of services and that payment has been received** per Local Rule 20-1406(c) by Eileen Giles; and Jamie Reeves.
10. Petitioner waives compensation.
11. Notice is complete.
12. No proposed order. Submit order after hearing.

RECOMMENDATION:

Need to clear notes #5, 7-9. If approved, set hearing re final discharge for 02/06/19 re Michele Leann Reed.

(nb/sa/lc/nb/cs/lh)

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

DATE: 04/11/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400057

CASE NAME: MTR OF BETTY JEAN MARTIN

SEE ALSO 19 20

HEARING:

Petition for Second and Final for Payment of Attorney Fees to
Court Appointed Counsel

COUNSEL:

LISA A BURGESS-PEEBLES	(CPE)...PRO/PER
BETTY JEAN MARTIN	(CEP)...SANDRA TURNER
MICHELE LEANN REED	(SC)...PRO/PER
DEBBIE JEANNE KROL	(SC)...PHYLLIS M GALLAGHER
SANDY TURNER	(PET)...SANDRA TURNER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Sandy Turner

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

1. Petitioner, Sandy Turned, was appointed Counsel for Betty Jean Martin on 03/06/14.
2. Petitioner requests fees of \$3,167.50 for 9.05 hours at the reduced rate \$350/hour for attorney services, which includes 1.50 of anticipated time for appearance at hearing on petition for fees. Itemized. [Petition, 2/1/18, LFpg9].
JTD
3. **Need** verified supplement with qualifications of paralegals per requirements of CRC 7.703(e)(1)(c) which show the completion of mandatory continuing education per Business & Professions Code 6450(d).
4. ~Proposed Order: 02/01/18 [attached to petition].

RECOMMENDATION

Court's discretion.

(lh)

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

DATE: 04/11/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400241

CASE NAME: Jessica Emily Araiza

HEARING:

Petition for MARIA ARAIZA BE REMOVED AS CONSERVATOR AND DEPT OF DEVELOPMENTAL SERVICES BE APPOINTED

COUNSEL:

MARIA MAGDALENA ARAIZA (CP)...PRO/PER
JESSICA EMILY ARAIZA (CTP)...JEANNE E KENNEDY/
WALTER MOORE (GAL)
INLAND REGIONAL CENTER (SC)...STEVEN K BECKETT
GABRIELA JENNIFER QUINTERO BRISENO (PET)...PRO/PER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Maria Araiza to be Removed as Limited Conservator and Dept of Developmental Services to be appointed Successor Limited Conservator by Walter Moore, GAL

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

1. Maria Araiza (mgm) was appointed Limited Conservator of the person only of Jessica Emily Araiza on 04/13/16. Court suspended powers of Maria Araiza on 01/08/18 and appointed Inland Regional Center as Successor Limited Conservator of the person.
2. Petitioner seeks removal of Maria Araiza as Conservator and for appointment of Dept of Developmental Services ("DDS") as Successor Limited Conservator, alleging conservator's step-daughter, Maria Brizeno, was arrested and charged with multiple counts of child sexual abuse which took place over the last two years. Ms. Brizeno had been residing with Conservator until one year ago, and Conservator Brizeno was a contact person at Cole Vocation Services for conservatee. It has not been determined whether conservatee is also a victim.
3. Conservator was previously appointed as Guardian for Jessica despite objections of Inland Regional Center due to difficulties they experienced with Conservator.

4. Previous GAL, Roberta L. Taylor, also objected to appointment of Conservator in the Report of GAL filed 11/26/14. GAL Taylor nominated the Director of DDS to serve as Conservator; however, they declined in a letter submitted 11/09/15.
5. Petitioner alleges Conservator continues to fail to perform duties as Conservator to provide a safe environment; has not provided Cole Vocational Services with documentation necessary to provide for Conservatee; fails to understand the extremely serious situation with Brizeno and failed to have Conservatee examined for possible abuse; fails to take advantage of IRC services; and fails to be responsive to emergent situations.
6. Notice was given.
7. No proposed Order submitted.

RECOMMENDATION

Court's discretion.

(lh)

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

DATE: 04/11/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400267

CASE NAME: DAVID L HEISS

SEE ALSO 24

HEARING:

Petition for Appointment of Successor Conservator of Person & Estate

COUNSEL:

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

GENERAL INFORMATION

Ex-parte orders granted on 10/16/17. Jennifer Heiss is appointed temporary successor conservator, of the person and estate, of David Heiss. Bond \$35,000.00 **Continued from 11/20/17.** The Court determines that this is conservator's petition/nomination of successor conservator not conservatee's petition.

Certificate of completion of Conservatorship Training Class filed in court. The Court does not request a new capacity declaration be filed. The Court re-refers matter to Court Investigator for a conservatorship report. The Court is informed Jeanne Kennedy is no longer appointed to represent David Heiss in this matter.

Continued from 01/30/18. Court noted Kay Adams' request to resign and nomination of successor conservator was granted on 10/16/17 and ex parte application was filed 10/03/17. Counsel indicated all parties have previously conferred with Judge Reilly in this matter. Court re-referred to Court Investigator.

THIS CASE IS SET FOR HEARING ON Petition for **Successor** Appointment of Conservator, person and estate, by Jennifer Heiss, sister-in-law

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

1. Kay Adams, previous conservator (sister), appointed temporary conservator on 11/05/14, resigned on 10/16/17 and requests that petitioner be appointed conservator.
2. Estate consists of \$246,696.59 (per corrected Inventory and Appraisal filed 08/26/16). However, corrected I & A filed 08/26/16 indicates \$436,696.59.

3. Petitioner seeks bond of \$35,000. Suggest bond of \$135,000 (POH -1st account Order by Kay Adams).
4. Petitioner seeks medical powers pursuant to Capacity Declaration filed on 09/18/14. Does court wish to request a new Capacity Declaration? JTD
5. **CI Report filed 04/04/18.**
6. **Declaration filed 04/02/18 requests authority to sell conservatee's personal residence and personal property to pay his debts and provide for his care.**
7. Certificate of Completion of the Conservatorship Training Class filed.
8. Notice filed.
9. ~Proposed Form Order: 10/03/17

RECOMMENDATION:

Court's discretion re bond. If approved, set hearing for Compliance Review for **11/14/18** for the filing of the required documents and hearing re Accounting Review for **06/19/19**. Any accounting to be filed 30 days in advance.

(cs/nb/lh)

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

DATE: 04/11/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400267

VACATED

CASE NAME: DAVID L HEISS

SEE ALSO 23

HEARING:

Accounting Review

COUNSEL:

KAY M ADAMS

(CPE)...JENNIFER M DANIEL

DAVID L HEISS

(CTE)...

JENNIFER H HEISS

(PET)...JENNIFER DANIEL

Second and Final Account of Kay Adams filed 02/20/18 and heard on 03/27/18.

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

DATE: 04/11/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600068

CASE NAME: IZACK PAUL MONTANO

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of JESSICA MONTANO

COUNSEL:

JESSICA MONTANO (CPE)...FRANK O TETLEY
IZACK PAUL MONTANO (CEP)...WALTER T. MOORE

X-REF: CIVDS 1603992 (Montano vs. Omnitrans et al)

GENERAL INFORMATION

Order appointing Jessica Montano conservator of the person and estate entered
12/13/16, no bond.

Continued from **07/18/17** at request of counsel.

Continued from 09/05/17 and 11/13/17 at request of court. Notice waived.

**Continued from 01/09/18 at request of Counsel to clear probate notes. Court
notes this case was transferred from Riverside County since the lawsuit is here.
Case will be kept in SB County.**

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

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

1. Amended Notification of Conservatee's Rights filed 01/09/18.
2. Determination of Conservatee's Appropriate Level of Care filed.
3. **Need** Statement of Care Plan in accord with Pr.C. §2352.5.
4. Final Inventory & Appraisal is incomplete at Sections 1, 2.4, 5; verified by attorney; not signed by probate referee (if req'd); and Attachment 1 is incomplete. **Need complete final inventory and appraisal.**
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:

When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. §2614.5. When documents are not filed as ordered, court may set a hearing in accord with Pr.C. §2655.

(nb/cs/nb/lh)

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

DATE: 04/11/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600187

CASE NAME: BLANCHE MARGUERITE CARTER

SEE ALSO 26A

HEARING:

Petition for Attorney's Fees

COUNSEL:

ARTHUR WOOD CARTER JR	(CPE)...MARK J. ANDREW FLORY
BLANCHE MARGUERITE CARTER	(CTE/CEP)...ZIPRICK & CRAMER
LARRY HOOVER	(CE)...ZUMBRUNN LAW CORP
GLORIA TAYLOR	(PET)...PASCUZZI, PAXCUZZI & STOKER
JANET DAWSON	(PET)...PASCUZZI, PAXCUZZI & STOKER
PUBLIC GUARDIAN	(CPE)...
ROBERT H ZIPRICK	(PET)...ZIPRICK & CRAMER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Mark Flory

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

1. Petitioner, Mark Flory was retained as Counsel by petitioner, Arthur Carter, Jr, for petition to be appointed as Conservator for Blanche Carter.
2. Petitioner requests fees of \$12,113.50 for 53.30 hours at \$350/\$105 per hour for attorney/paralegal services, plus an additional anticipated \$682.50 for 1.5 hours for appearance at this hearing for a total of **\$12,796**. Itemized. [Petition, 03/06/18, LFpgs 8-18]. **JTD**
3. Notice was given.
4. ~Proposed Order: 03/06/18

RECOMMENDATION

Court's discretion.

(lh)

Future Hearing: 7/25/18 Accounting Review

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

DATE: 04/11/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600187

CASE NAME: BLANCHE MARGUERITE CARTER

SEE ALSO 26

HEARING:

Petition for AND DECLARATION REGARDING ATTORNEY'SFEES

COUNSEL:

ARTHUR WOOD CARTER JR	(CPE)...MARK J. ANDREW FLORY
BLANCHE MARGUERITE CARTER	(CTE/CEP)...ZIPRICK & CRAMER
LARRY HOOVER	(CE)...ZUMBRUNN LAW CORP
GLORIA TAYLOR	(PET)...PASCUZZI, PAXCUZZI & STOKER
JANET DAWSON	(PET)...PASCUZZI, PAXCUZZI & STOKER
PUBLIC GUARDIAN	(CPE)...
ROBERT H ZIPRICK	(PET)...ZIPRICK & CRAMER

GENERAL INFORMATION

Continued from 03/21/18 to be heard with Mr. Flory's petition for attorney fees.

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Robert Ziprick

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

1. Petitioner, Robert Ziprick was the attorney for conservatee Blanche Marguerite Carter (now deceased).
2. Petitioner requests fees of \$15,476.28 for attorney/paralegal services charged at \$300/\$200/\$100 per hour.
 - a. **Need** verified supplement with separate subtotals setting forth number of hours charged at different rates per Local Rule 20-1402.
3. **Need** verified supplement with qualifications of paralegals per requirements of CRC 7.703(e)(1)(c) which show the completion of mandatory continuing education per Business & Professions Code 6450(d).
4. ~Proposed Order: 10/31/16.

RECOMMENDATION

Need to clear notes #2-3 then Court's discretion .

(lh)

Future Hearing: 7/25/18: Accounting Review

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

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

DATE: 04/11/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600267

CASE NAME: SABRINA A. MOORE

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MICHELLE MOORE

COUNSEL:

MICHELLE MOORE	(CPE)...PRO/PER
TIFFANY MOORE	(CPE)...PRO/PER
SABRINA A MOORE	(CEP)...ROSE C ROSADO

GENERAL INFORMATION

Continued form 01/10/18.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Michelle Moore (mother) and Tiffany Moore (sister) appointed co-conservators of the person on 06/07/17.
2. Notification of Conservatee's rights; however, proof of service, #5 indicates/incorrect date of Order. Court to inquire if Order dated 06/07/17 was served to parties. **JTD**
3. Determination of Conservatee's Appropriate Level of Care filed 01/05/18.
4. Care Plan filed 01/05/18.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 04/11/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700069

CASE NAME: CHRISTIAN LIGHTER SIAGIAN

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of DAN SIAGIAN

COUNSEL:

DAN SIAGIAN (CP)...PRO/PER
CHRISTIAN LIGHTER SIAGIAN (CTP)...CANDICE A GARCIA-RODRIGO

GENERAL INFORMATION

Continued from 01/10/18. Court determined Conservator did not serve a copy of the order in notices sent. Need proper notice to be given.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Dan Siagian appointed Conservator of the person on 06/07/17.
2. Notification of Conservatee's rights filed 01/08/18; however, **need proper notice to include service of Order.**
3. Determination of Conservatee's Appropriate Level of Care filed 01/08/18.
4. Care Plan filed 01/08/18.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 04/11/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700338

CASE NAME: MTR OF VICTOR OLIVARES, JR

HEARING:

Hearing Re: EVICTION/DEFAULT JUDGMENT

COUNSEL:

ORFELINDA OLIVARES (CPE)...LAW OFFICE OF JOHN R RAMOS
VICTOR OLIVAREZS JR (CEP)...CANDICE A GARCIA-RODRIGO

GENERAL INFORMATION

Continued from 01/16/18. Mr. Roth will file a motion for FAMSS1704023 to be heard with this matter.

Continued from 01/31/18. Mr. Roth reported motion to set aside default in family law matter has been set for 02/22/18. Mr. Roth will file a motion to consolidate this matter and the family law matter requesting the cases be heard together in the probate Court. Court orders Conservator of the estate to handle the eviction of the ex-spouse from conservatee's home.

THIS CASE IS SET FOR HEARING ON EVICTION/DEFAULT JUDGMENT

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

1. Matter set on 12/28/17, wherein, Court appointed Orfelinda Olivares as conservator of the person and estate of Victor Olivares, Jr; \$65,000 bond. Proof of bond filed 01/24/18.
2. Court ordered conservator to remove/evict conservatee's ex-spouse from the family home. Court allows conservatee's children to remain in home so long as they are cooperative with conservator and court proceedings, and pose no harm to conservatee.
3. Court orders Court Investigator to refer this matter to Adult Protective Services for them to do a welfare check on conservatee's living conditions and people living in the home.
4. CI report filed 12/27/17 and **02/14/18.**

5. Declaration of Conservator Orfelinda Olivares filed 01/29/18 alleges Counsel was retained to prosecute the Unlawful Detainer action against Jenifer Olivares. Delays were caused by Ms. Olivares stating numerous times that she would vacate the property, but failed to do so.

RECOMMENDATION

Inquire status.

(lh)

Future Hearing: 3/07/18 Accounting Review

Superior Court of Calif, County of San Bernardino
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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY **ELDER ABUSE**

DATE: 04/11/18 TIME: 9:30 DEPT: S37P

CASE#: EAP PS1800010

CASE NAME: HERNANDEZ VS. DELLANO

HEARING:
Hearing Re: EVIDENTIARY HEARING

COUNSEL:
HUGO A HERNANDEZ (PP)...CRAIG M PARKER
HUGO DELLANO (RP)...
WANDA LOY ()...

XREF: CONPS1700467 (*Hugo A Hernandez*)

No notes—Court's discretion.