



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 04/16/18

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.

(03/20/18 & 04/11/18ww)(03/29/18 & 04/10/18 cs)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO San Bernardino District - Civil
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CIVIL**

DATE: 04/16/18 TIME: 8:30 DEPT: S35P

CASE#: CIV DS1704253

CASE NAME: PARCHAMN -VS- DEEDS

SEE ALSO 2 3

HEARING:

Motion Re: TO STRIKE PORTIONS AMENDED CROSS COMPLAINT

COUNSEL:

LAWRENCE P PARCHMAN SR

(PLA)...PRO/PER

JON F PARCHMAN

(PLA)...PRO/PER

MARY C JOHNSTON

(PLA)...PRO/PER

SANDRA DEEDS

(CC/DEF)...JOHN SETLICH

Currently under review by Legal Research

LR

(ww)

Future Hearing: 4/27/18 Trial Setting Conference

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 04/16/18 TIME: 8:30 DEPT: S35P

CASE#: CIV DS1704253

CASE NAME: PARCHAMN -VS- DEEDS

SEE ALSO 1 3

HEARING:

Motion Re: DEMURRER TO AMENDED ANSWER TO COMPLAINT

COUNSEL:

LAWRENCE P PARCHMAN SR	(PLA)...PRO/PER
JON F PARCHMAN	(PLA)...PRO/PER
MARY C JOHNSTON	(PLA)...PRO/PER
SANDRA DEEDS	(CC/DEF)...JOHN SETLICH

Currently under review by Legal Research

LR

(ww)

Future Hearing: 4/27/18 Trial Setting Conference

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 04/16/18 TIME: 8:30 DEPT: S35P

CASE#: CIV DS1704253

CASE NAME: PARCHAMN -VS- DEEDS

SEE ALSO 1 2

HEARING:

Motion Re: DEMURRER TO AMENDED CROSS COMPLAINT

COUNSEL:

LAWRENCE P PARCHMAN SR	(PLA)...PRO/PER
JON F PARCHMAN	(PLA)...PRO/PER
MARY C JOHNSTON	(PLA)...PRO/PER
SANDRA DEEDS	(CC/DEF)...JOHN SETLICH

Currently under review by Legal Research

LR

(ww)

Future Hearing: 4/27/18 Trial Setting Conference

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 04/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400042

CASE NAME: Carolyn Jacobson

SEE ALSO 14

HEARING: Re: Amended(first) pet for order to determine:1)interest

COUNSEL:

JULIE STEWART (PET)...DUANE P BOOTH
CAROLYN JACOBSON (DEC)...
BAKER P.M.J.LP (PET)...TIMOTHY L. MCCANDLESS
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP)...
JONI JACOBSON (LAW OFFICES OF TIMOTHY L MCCAN)
KATHERINE HALL (PRO/PER)
AJC TRUE GRIT LLC
PROJECT PROPERTY NUMBER FIVE
TIMOTHY L MCCANDLESS
CD&G INC.
WESTERN STATES DEVELOPMENT & CONSTRUCTION
ESTATE OF JACK HALL

XREF: PROPS1300285 ROBERT LYLE MEE
CIVBS1200309 ACJ TRUE GRIT-V-SCOTT MARTIN

Currently under review by Legal Research.
(LR)

Future Hearings:

04/27/18 Hearing Re: PTN FOR ORDERS TO DETERMINE:1 IN INTEREST,
04/27/18 Hearing Re: MTN RE SPCL DEMURRER BY RES/DEF BAKER TO 5TH, ETC
04/27/18 Hearing Re: MTN RE NTC OF MTN, MTN TO STRIKE PORTION,
04/27/18 Hearing Re: MTN RE 2ND MTN TO STRIKE PORTIONS OF PTN,
04/27/18 Hearing Re: MTN RE NTC OF HRG ON MTN & ITS 3RD MTN TO,
04/27/18 Accounting Review by ***
04/27/18 Hearing Re: MANDATORY SETTLEMENT CONFERENCE
10/03/18 Readiness Calendar
10/29/18-11/02/18 Court Trial

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

DATE: 04/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400622

CASE NAME: Robert Joseph Vinson

HEARING: ACCOUNT AND REPORT OF EXECUTOR Account and Report of
FREDERICK LAFATE VINSON III and Petition for allowance of fees filed.

COUNSEL:

ROBERT JOSEPH VINSON SR	(DEC)...
FREDERICK LAFATE VINSON	(PET)...PRO/PER
FREDERICK LAFATE VINSON III	(PET)...PRO/PER
JANNINA K MALEK	(PET/TP)...THOMAS W DOMINICK
SURETEC INSURANCE COMPANY	(WOLKIN CURRAN LLP)

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON 2nd Account Current and Report of executor,
Frederick (Eric) Vinson III [Petitioner].

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

1. This report is in the nature of a status report. Petitioner indicates the estate is not in a condition to be closed due to an outstanding claim with Franchise Tax Board which has been void, however official notice has not yet been filed.
2. Petitioner requests indicates estimated time to close estate is 30 days.
3. First account of executor approved on 03/22/17 covering the period of 03/07/14-05/06/16.
4. Assets on hand \$67,966.89 placed in blocked account.
5. **Need** Notice of Hearing and proof of service in accord with Pr.C. § 12201. Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. § 10950. This form of notice is mandatory.

RECOMMENDATION

Need to clear notice. Court's discretion. Matter appears moot as Amended accounting filed and set for 05/10/18.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 04/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600220

CASE NAME: MTR OF YNEZ NUNO

HEARING:

Accounting Review by ***

COUNSEL:

JOHN M NUNO (PET)...BANKS GARCIA & JANIS
YNEZ NUNO (DEC)...

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

GENERAL INFORMATION

Continued from 06/28/17. Counsel to prepare and file account by 4pm on 08/28/17.
Continued from 09/27/17 and 01/17/18.

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters Testamentary issued to John Nuno, son, on 05/10/16; full authority, \$200,000 bond.
2. Final Inventory and Appraisal filed.
3. **Need** accounting or status report.

RECOMMENDATION

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

(lc/ww/lh/cs)

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 04/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600521

CASE NAME: MTR OF EUGENE MOORE

HEARING:

Pet for final distribution on waiver of Account and Report of
MICAELA POWELL and Petition for allowance of fees filed.

COUNSEL:

MICAELA POWELL (PET)...ROBERT J SPITZ
EUGENE MOORE (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of
Account and for Fees by Micaela Powell, daughter/administrator.

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

1. Assets on Hand: \$29,355.80 in cash
2. Current bond is \$20,000.00
3. Petitioner waives statutory compensation.
4. Attorney requests statutory fees of \$11,500.00 Calculated.'
5. **Need** bank statement in support of ending balance of accounting per Local Rule 20-908.
6. **Need** copy of escrow closing statement for sale of real property per Local Rule 20-910.
7. Notice given.
8. Proposed Order: 02/26/18, assets on hand is missing, need statements re: notice per Pr.C. § 9202, creditors, sole and separate property, taxes/debts paid, need "Other Orders" section removed.

RECOMMENDATION

Need to clear notes 5 & 6 then Court's discretion. If approved, set hearing re receipts and final discharge for **04/22/19**.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 04/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700471

CASE NAME: MTR OF DONALD EUGENE HAGEMAN AKA DONALD E. HAGEMAN

HEARING:

PETITION FOR FINAL DISTRIBUTION AND WAIVER Account and Report of
JAMES M CODDINGTON and Petition for allowance of fees filed.

COUNSEL:

JAMES M CODDINGTON (PET)...BETTY AUTON-BECK
DONALD EUGENE HAGEMAN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of
Account and for Fees by James Coddington, friend/executor

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

1. Assets on Hand \$128,192.22 consisting in cash.
2. Current Bond: \$150,000.00. Sufficient.
3. Petitioner waives statutory compensation.
4. Attorney requests statutory fees of \$5,728.89. Calculated.'
5. **Need** bank statement in support of ending balance of accounting per Local Rule 20-908.
6. Notice given.
7. ~Proposed Order: 01/29/18

RECOMMENDATION

Need to clear note 5 then Court's discretion. If approved, set hearing re receipts and final discharge for **04/22/19**.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 9

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

DATE: 04/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800211

CASE NAME: JOSEPH DAGG, JR

HEARING:

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

COUNSEL:

JOHN T DAGG (PET)...WILLIAM K SWEENEY
JOSEPH DAGG JR. (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by John Dagg, son

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

1. Petitioner alleges to be sole heir and waives bond. Net value of the estate consists of \$240,200.00 of which \$6,200.00 is personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. The petition for probate is on an outdated form. **JTD**
3. ~Proposed Form Order: 03/05/18

RECOMMENDATION

Court's discretion re bond and note 2. If approved, set Accounting/Status Review **06/24/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 10

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

DATE: 04/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800222

CASE NAME: MTR OF TIMOTHY JOHN ROBLEDO

HEARING:

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

COUNSEL:

SHERYL ANN ROBLEDO (PET)...JT LEGAL GROUP, APC
TIMOTHY JOHN ROBLEDO (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Sheryl Ann Robledo, spouse

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

1. All heirs waive bond. The estate consists of \$227,600.62 of which \$0.62 is personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. **Need** proof of publication
3. ~Proposed Form Order: 03/07/18

RECOMMENDATION

Need to clear note 2. Court's discretion re bond. If approved, set Accounting/Status Review **06/24/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

DATE: 04/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800223

CASE NAME: MTR OF ETHEL G JOHNSTON

HEARING:

Petition to determine succession to Real Property

COUNSEL:

RONALD JOHNSTON	(PET)...ROBERT E BRIGHT
BARBARA SEACHREST GARDNER	(PET)...ROBERT E BRIGHT
ETHEL G JOHNSTON	(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Ronald Johnston and Barbara Gardner, [grandson and granddaughter/Petitioners]

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

1. Petitioners seek 100% interest, one-half each; in decedent's 100% interest; in real property per intestate succession.
2. **Need** corrected Inventory and Appraisal. I & A attached to petition [LF, p. 18] does not include:
 - a. Barbara Gardner's signature of verification.
 - b. Section 5 is incomplete re property tax certification.
3. Notice given.
4. ~Proposed form Order: 03/28/18

RECOMMENDATION

Need to clear note 2, then Court's discretion.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 12

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/16/18 TIME: 8:30 DEPT: S35P

CASE#: TRU PS1800042

CASE NAME: The Smith Family Trust

HEARING:

Petition for /to Modify Trust and Appoint Successor Co trustees

COUNSEL:

DERRICK J SMITH

THE SMITH FAMILY TRUST

(PET)...CHARLES S ALTHOUSE

(TRU)...

Currently under review by Legal Research

LR

NOTICE:

Notice is complete.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 13

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

DATE: 04/16/18 TIME: 8:35 DEPT: S35P

CASE#: PRO DS1000426

CASE NAME: DANIEL ROMERO

HEARING:

Petition for Approval to Amend the Trust

COUNSEL:

INLAND COUNTIES REG CNTR (PET)...STEVEN K BECKETT
DANIEL ROMERO (BEN)...
THE SPECIAL NEEDS TRUST OF DANIEL ROMERO (TRU)...

Currently under review by Legal Research

LR

NOTICE:

Notice given.

(ww)

Future Hearing: 8/01/18 Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 14

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

DATE: 04/16/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1400042

CASE NAME: Carolyn Jacobson

SEE ALSO 4

HEARING:

Motion Re: app for leave of court to file first supp to first
amended "pet for ord to det" Filed by Petitioner JULIE STEWART

COUNSEL:

JULIE STEWART (PET)...DUANE P BOOTH
CAROLYN JACOBSON (DEC)...
BAKER P.M.J.LP (PET)...TIMOTHY L. MCCANDLESS
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP)...
JONI JACOBSON (LAW OFFICES OF TIMOTHY L MCCAN)
KATHERINE HALL (PRO/PER)
AJC TRUE GRIT LLC
PROJECT PROPERTY NUMBER FIVE
TIMOTHY L MCCANDLESS
CD&G INC.
WESTERN STATES DEVELOPMENT & CONSTRUCTION
ESTATE OF JACK HALL

XREF: PROPS1300285 ROBERT LYLE MEE

CIVBS1200309 ACJ TRUE GRIT-V-SCOTT MARTIN

Currently under review by Legal Research

LR

(ww)

Future Hearings:

04/27/18 Hearing Re: PTN FOR ORDERS TO DETERMINE:1 IN INTEREST,
04/27/18 Hearing Re: MTN RE SPCL DEMURRER BY RES/DEF BAKER TO 5TH, ETC
04/27/18 Hearing Re: MTN RE NTC OF MTN, MTN TO STRIKE PORTION,
04/27/18 Hearing Re: MTN RE 2ND MTN TO STRIKE PORTIONS OF PTN,
04/27/18 Hearing Re: MTN RE NTC OF HRG ON MTN & ITS 3RD MTN TO,
04/27/18 Accounting Review by ***
04/27/18 Hearing Re: MANDATORY SETTLEMENT CONFERENCE
10/03/18 Readiness Calendar
10/29/18-11/02/18 Court Trial

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

Superior Court of Calif, County of San Bernardino

Page: 15

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIPS

DATE: 04/16/18 TIME: 9:30 DEPT: S35P

CASE#: RC RS00441

CASE NAME: ADAM TAN NGUYEN

SEE ALSO 16

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$500 ON VICKIE NGUYEN

COUNSEL:

VICKIE NGUYEN

(PET)...

ADAM TAN NGUYEN

(PCE)...MAUREEN MURATORE

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON OSC Re Sanctions of \$500 on Vickie Nguyen

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

1. Matter set on 03/05/18, wherein Court orders Vickie Nguyen, Conservator, to be personally present in court on 04/16/18.

RECOMMENDATION:

Court's discretion.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 16

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/16/18 TIME: 9:30 DEPT: S35P

CASE#: RC RS00441

CASE NAME: ADAM TAN NGUYEN

SEE ALSO 15

HEARING:

Hearing Re: STATUS OF POOL ON THE PROPERTY

COUNSEL:

VICKIE NGUYEN

(PET)...

ADAM TAN NGUYEN

(PCE)...MAUREEN MURATORE

GENERAL INFORMATION

Continued from 03/05/18. Court appoints Maureen Muratore as counsel for conservatee. Court order Vickie Nguyen to be personally present on 04/16/18 for OSC re sanctions of \$500 for failure to appear.

THIS CASE SET FOR HEARING ON Status of Pool on the Property

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

1. Hearing was set by Court on 02/08/18 to address the pool that is not fenced.
2. **Need** report of Maureen Muratore, counsel for proposed conservatee.

RECOMMENDATION

Need report of counsel, then Court's discretion.

(ww/cs)

Superior Court of Calif, County of San Bernardino

Page: 17

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PUBLIC GUARDIAN

DATE: 04/16/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS0600036

CASE NAME: MTR OF BEVERLY WOODRUFF

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN
BEVERLY WOODRUFF

(CPE)...COUNTY COUNSEL
(CEP)...HARTNELL LAW GROUP

General information

Letters expired: 01/29/17.

Continued from 01/25/16, 07/11/17, 03/06/17 and 10/30/17 at request of counsel.

This case is set for hearing on Accounting Review

The following issues and/or deficiencies in the papers are noted:

1. Ex Parte Order that Conservator need not present 6th account by PG approved on 12/16/14.
2. **Need** 7th account or waiver of account beginning with the date of 11/06/14.

RECOMMENDATION

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

(dl/nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 18

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

DATE: 04/16/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS0700267

CASE NAME: KENZIE SCOTT

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
KENZIE SCOTT (CEP)...HARTNELL LAW GROUP

Ex-Parte Order that Conservator need not present Third Waiver of Account sent to department for signature on 04/10/18. Clerk's office to set next Accounting review for 05/06/19.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 19

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

DATE: 04/16/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS0800079

CASE NAME: JAMES OSCAR OWEN

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
JAMES O OWEN (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expired: 3/04/17.

Continued from 10/03/16, 02/27/17 and 08/14/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON accounting review

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

1. Ex Parte Order that Conservator need not present 6th account by PG approved on 09/30/15
2. **Need** 7th account or waiver of account beginning with date of 08/01/15.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(lc/nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 20

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

DATE: 04/16/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS0800193

CASE NAME: MTR OF LAUREN NEWLIN

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
LAUREN NEWLIN (CEP)...HARTNELL LAW GROUP

Ex-Parte Order that Conservator need not present 8th Waiver of Account sent to department for signature on 04/11/18. Clerk's office to set next Accounting review for 05/26/19

(cs)

Superior Court of Calif, County of San Bernardino

Page: 21

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

DATE: 04/16/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS0800212

CASE NAME: TRACY RAMOS

HEARING:

Hearing re: Petition for authority to establish an Irrevocable Burial Trust.

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
TRACY RAMOS (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters Expire: 04/08/18

THIS CASE IS SET FOR HEARING ON Petition to establish Irrevocable Burial Trust by Public Guardian.

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

1. Petitioner alleges the current assets on hand are \$36,611.02, that there are sufficient funds to provide for conservatee's ongoing care and to establish a burial trust, and that the eligibility criteria for Social Security Disability does not allow for the recipient's account exceed \$2,000.
2. Petitioner requests authority to deposit up to \$5,000.00 in an Irrevocable Burial Trust.
3. Notice of Hearing and Proof of Service filed on 03/01/18; however, the indicated hearing date of 04/06/18 is incorrect. **Need** corrected notice.
4. ~Proposed Order: 02/27/18

RECOMMENDATION:

Court's discretion.

(ww)

Future Hearing: 05/04/18 Court Trial
11/26/18 Accounting Review

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

DATE: 04/16/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS0900023

CASE NAME: CARRIE JOHNSON

HEARING: SECOND AND FINAL Account and Report of PUBLIC GUARDIAN and
Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
MELODIE Z. SCOTT	(PCR)...
JENNIFER M. DANIEL	(PET)...JENNIFER M DANIEL
CARRIE JOHNSON	(CEP/PCE)...HARTNELL LAW GROUP

GENERAL INFORMATION

Decedent passed away on 10/30/15.

Continued from 02/26/18 County Counsel to serve Jennifer Daniel with a copy of the accounting by 4pm February 28, 2018; any supplement to be filed by 4pm, March 26, 2018. If there are any objections of Jennifer Daniel, the objections must be filed and served by 4pm March 26, 2018.

THIS CASE IS SET FOR HEARING ON Second and Final account and petition for fees by Public Guardian

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

1. Accounting period covers 03/26/14 – 06/13/17 (pre and post death)
2. Assets on hand \$0.
3. Petitioner indicates all assets have been turned over to the Public Administrator and after payment of petitioner's fees and attorney's fees there will be no assets remaining on hand for distribution.
4. Petitioner requests authorization and confirmation to distribute the amount of \$10,438.08 to the Public Guardian.
5. Public Guardian request fees of \$4,400.00 for the period of 07/01/14 to 04/30/16 be authorized and confirmed
6. County Counsel request fees of \$1,900.00 for the period of 07/01/14 to 01/31/16 be authorized and confirmed.
7. Notice to Attorney Jennifer Daniel served on 03/09/18.
8. As of review of file, no objections have been filed.
9. ~Proposed order 10/24/17.

RECOMMENDATION:

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

04/22/19

(CS)

Superior Court of Calif, County of San Bernardino

Page: 23

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

DATE: 04/16/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1100261

CASE NAME: LAURA FLEMING

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN
LAURA FLEMING

(CPE)...COUNTY COUNSEL
(CEP)...

GENERAL INFORMATION

Continued from 07/11/16, 03/20/17 and 08/14/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 2nd and current account by PG approved on 07/07/14.
2. Notice of Death of Conservatee filed 02/01/18 reflecting that conservatee passed on 01/18/18.
3. **Need** 3rd and final accounting to include pre and post death accounting periods beginning with date of 02/28/14.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(sa/nb/ww)

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

DATE: 04/16/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1500301

CASE NAME: RONALD ANDERSON

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of THE OFFICE OF THE PUBLIC GUARDIAN

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
RONALD ANDERSON	(CEP)...HARTNELL LAW GROUP
SHERRI L KASTILAHN	(PET)...SHERRI L KASTILAHN
HIGHLAND SPRINGS CARE CNTR (TP)	...RITA A REHASTE

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. PG, appointed conservator of the estate only on 02/25/16 and then conservatorship of the person was added on 09/11/17, no bond.
2. Notification of Conservatee's rights per Pr.C. §1830(c) filed 04/05/16 as to estate only; however, **need** an amended Notice as PG is conservator of the person also as of 09/11/17.
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C. §2352.5.
5. Final Inventory & Appraisal per Pr.C. §2610 filed 07/13/16.
6. Proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C. § 2610 filed on 07/21/16.
7. Conservatee's only real property was sold on 05/15/17.

RECOMMENDATION

Need to clear notes 2-4.

(ww)

Future Hearing: 11/19/18 Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 25

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

DATE: 04/16/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600287

CASE NAME: MTR OF ALFRED TROTTER

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (PET)...COUNTY COUNSEL
ALFRED TROTTER (CEP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review

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

1. PG appointed temporary conservator of the person and estate on 10/17/16 and then general conservator of the person and estate on 02/06/17, no bond.
2. Final Inventory and Appraisal filed 09/05/17.
3. **Need** 1st accounting beginning with date of 10/17/16.

RECOMMENDATION:

Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 26

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

DATE: 04/16/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1700101

CASE NAME: MTR OF CHRISTINE HEARD

HEARING:

Hearing re: Petition for authority to establish an Irrevocable Burial Trust.

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
CHRISTINE HEARD (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire: 06/02/18

THIS CASE IS SET FOR HEARING ON Petition to establish Irrevocable Burial Trust by Public Guardian.

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

1. Petitioner alleges the current assets on hand are \$5,187.50, that there are sufficient funds to provide for conservatee's ongoing care and to establish a burial trust, and that the eligibility criteria for Social Security Disability does not allow for the recipient's account exceed \$2,000.
2. Petitioner requests authority to deposit up to \$5,000.00 in an Irrevocable Burial Trust.
3. ~Proposed Order:03/01/18

RECOMMENDATION:

Court's discretion.

(ww)

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

DATE: 04/16/18 TIME: 10:00 DEPT: S35P

CASE#: SC SS03016

CASE NAME: MTR OF WANDA A. HARDY

HEARING:

FOURTH Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

CHRIS HARDY	(CPE)...PRO/PER
PUBLIC GUARDIAN	(SC)...COUNTY COUNSEL
WANDA A HARDY	(CEP)...HARTNELL LAW GROUP
LEGACY POST-ACUTE REHABILITATION (TP)	...SANDERS, COLLINS & REHA
AMERICAN CONTRACTORS INDEMNITY (PRO/PER)	
C L FARRELL	(C.L. FARRELL)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Fourth Account Current and Petition for Fees by Conservator of the Person and Estate, Public Guardian ["Petitioner"].

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

1. Accounting period: 06/06/14-07/31/16
2. Assets on Hand \$10,627.03 of which \$536.64 is cash and the rest in a burial trusts/needs.
3. Public Guardian requests fees totaling \$5,263.00. Approving and confirming \$will be deferred until such time as the conservatorship estate has sufficient funds for such purpose; approving and confirming \$1063.00 which was previously collected by petitioner. Generally itemized. [LF pg. 7] **JTD**
4. County Counsel request fees in the amount of \$2,763.00. Approving and confirming and \$2,100.00 will be deferred until such time as the conservatorship estate has sufficient funds for such purpose; approving and confirming \$663.00 was previously collected by petitioner. Generally itemized. [LF pg. 7] **JTD**
5. Petitioner requests to defer \$450.00 Court Investigator's fee until sufficient funds for such purpose. **JTD** [LF pg. 7]
6. Petitioner and Counsel failed to date signatures. **JTD** [LF pg. 7]
7. Notice is complete.

8. Proposed Order: 09/07/17 however, section 2a of prayer does not match petition as petition confirms that amount of \$263.00 was previously collected by PG.

RECOMMENDATION:

Court's discretion. If approved, set for next Accounting Review in 60 days as fifth account current is overdue.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 28

San Bernardino Superior Court

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/16/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS4872

CASE NAME: IN THE MATTER OF JANET HELFAND

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

JANET HELFAND

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expired 07/17/16.

Continued from 03/06/17 and 10/02/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Second Account approved on 08/17/15; account or waiver of account now due.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(nb/lh/cs)

Superior Court of Calif, County of San Bernardino

Page: 29

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

DATE: 04/16/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS5023

CASE NAME: MTR OF WILLIAM OWENS

SEE ALSO 30

HEARING:

Hearing Re: Proof of Transfer

COUNSEL:

PUBLIC GUARDIAN

WILLIAM OWENS

(CPE)...COUNTY COUNSEL

(CEP)...DONNA STURGILL DIAZ

GENERAL INFORMATION

Conservatee died (per 11/09/12 minute order)

Continued from 12/14/15, 05/23/16, 11/07/16, 03/27/17 and 08/14/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Proof of Transfer

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

1. Matter was set at 10/26/15 hearing re: petition to determine succession.
2. **Need** proof that the real property was transferred to the decedent's 3 surviving children - Raymond Owens, John Owens, and Laureen Schall.

RECOMMENDATION:

Inquire status.

(lc/dl/lc/nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 30

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

DATE: 04/16/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS5023

CASE NAME: MTR OF WILLIAM OWENS

SEE ALSO 29

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
WILLIAM OWENS (CEP)...DONNA STURGILL DIAZ

GENERAL INFORMATION

Conservatee died 10/02/12 (per 11/09/12 minute order)

Letters terminated on 11/19/12.

Continued from 03/27/17 and 08/14/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 6th Account by PG approved on 07/02/12.
2. Petition to liquidate estate and transfer remaining asset of real property and distribute to heirs approved on 08/31/15.
3. Petition to determine succession to real property was approved on 10/26/15. It appears that as of that date there would be no remaining assets to account for.
4. **Need** 7th and final account to include pre and post-death account periods beginning with date of 12/09/11-10/26/15.

RECOMMENDATION:

Inquire status.

(nb/ww)

Superior Court of Calif, County of San Bernardino
Page: 30A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 04/16/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS01654

CASE NAME: MTR RE TINA GALLO

HEARING:

Hearing re: Petition for authority to establish an Irrevocable Burial Trust.

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
TINA GALLO (CEP)...HARTNELL LAW GROUP

Under review as petition not in LF at time of review.///

Superior Court of Calif, County of San Bernardino

Page: 30B add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/16/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300223

CASE NAME: Virginia Kuchta

SEE ALSO 30C

HEARING: Accounting Review

COUNSEL:

JANETTE LUCAS	(CPE/SC)...PRO/PER
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
SURETEC INSURANCE COMPANY(PET)	...PRO/PER
VIRGINIA KUCHTA	(CEP)...JENNIFER DANIEL

GENERAL INFORMATION

Continued from **09/26/17** at request of counsel. Notice to be given by Attorney Jennifer Daniel.

Matter set at **12/12/17**. There being no appearance by Janette Lucas, the Court sets an OSC Re: Sanctions in the amount of \$500.00 for failure to appear at today's hearing and Failure to File Accounting. The Court orders Janette Lucas to appear at the next hearing.

Continued from **02/27/18**. Court vacates osc re sanctions set for 02/27/18; Court orders Janette Lucas to be personally present in court at 10:00am – Dept. S35 on 03/26/18. Court refers this case to the public guardian for possible appointment as successor conservator of person and estate.

Continued from 03/26/18. Matter called without all counsel present-matter is continued to April 16, 2018.

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

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

1. 1st and current account by Janette Lucas, conservator of person and estate approved on 03/28/17 for period ending 09/04/15.
2. **Need** 2nd Account current beginning with date of 09/05/15.

RECOMMENDATION

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(lh/nb/ww/cs)

Superior Court of Calif, County of San Bernardino
Page: 30C add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 04/16/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300223

CASE NAME: Virginia Kuchta

SEE ALSO 30B

HEARING:

Hearing Re: OSC RE REFERRAL TO PUBLIC GUARDIAN

COUNSEL:

JANETTE LUCAS	(CPE/SC)...PRO/PER
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
SURETEC INSURANCE COMPANY(PET)	...PRO/PER
VIRGINIA KUCHTA	(CEP)...JENNIFER DANIEL

GENERAL INFORMATION

Continued from 03/26/18

THIS CASE SET FOR HEARING ON OSC re Referral to Public Guardian

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

1. OSC set on 02/27/18 at the Accounting Review Hearing.
2. Janette Lucas, conservator of the person and estate/nominee, is ordered to appear.
3. Court has authority to remove current conservator and appoint successor conservator.

RECOMMENDATION

Court's discretion re OSC.

(ww/cs)

Superior Court of Calif, County of San Bernardino

Page: 31

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT TRIAL

DATE: 04/16/18 TIME: 1:30 DEPT: S35P

CASE#: CON PS1500161

VACATED

CASE NAME: MTR OF ELVIRA ALBURJAS

HEARING:

Hearing Re: COURT TRIAL (FIRST DAY)

COUNSEL:

ROBERT DENNY

(CPE)...JAMES A HAGAN

MARIA YOLANDA DENNY

(CPE)...JAMES A HAGAN

ELVIRA ALBURJAS

(CEP)...MATTHEW E SHEASBY

BEATRIZ TRAVERSO

(PET/OBJ)...DAVID P COLELLA

No Notes-Court Trial- JTD.

(ww)

Future Hearings:

4/17/18 Hearing re: Review & Ptn for Conservatorship of Person/Estate

4/17/18 Hearing re: Trial Setting Conference

4/17/18 Court Trial (Day 1)

4/18/18 Court Trial (Day 2)

4/19/18 Court Trial (Day 3)

4/20/18 Court Trial (Day 4)

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

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **PROBATE**

DATE: 04/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1100815

CASE NAME: LUIS F AVALOS SPECIAL NEEDS TRUST

SEE ALSO 2

HEARING:

Petition for AUTHORITY TO SELL AND PURCHASE REAL PROPERTY

COUNSEL:

BANK OF THE WEST (PET)...BURGH, BALIAN & BERGSTEIN
LUIS F AVALOS SPECIAL NEEDS TRUST (TRU)...
NOREEN T FONTAINE ESQ (PET/STE)...NOREEN T FONTAINE

GENERAL INFORMATION:

Continued from 11/14/17 and 01/08/18.

THIS CASE IS SET FOR HEARING ON Petition for Authority to Sell and Purchase Real Property by Successor Trustee, Noreen T. Fontaine ["Petitioner"] of the Luis F. Avalos Special Needs Trust. [Pr.C. § 17200(b)].

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

1. Petition indicates that the property on hand at the end of the third account ending on 08/31/15, consists of monthly annuity payments for life and real property located at 9320 Frankfort Avenue, Fontana, CA ["Frankfort Property"].
2. Petitioner states that the property the property was built in 1952; was purchased in August 2001 for \$128,000 and is currently worth \$320,000; alleges that while the real property is shown to have experienced a 130.7% increased value since 2001, its' physical condition needs attention; as minimal improvements and upgrades have been done.
3. Petitioner believes that it would be advantages to the Trust and ultimately the beneficiary for a sale of the Frankfort property and purchase of a newer one at this time. Petitioner states the goal is to sell the Frankfort real property and purchase a newer property in the City of Perris, via an all cash transaction.
4. The Trustee requests Court authority to sell the property located on 9320 Frankfort Avenue, Fontana, CA and purchase a comparably priced property in San Bernardino or Riverside County.
5. Copies of bank statement as of 07/31/17 and home estimates are affixed to petition.

6. Current bond of \$6,000. Petitioner seeks an increase to bond to \$150,000. Insufficient. Suggest bond increase by \$287,000 for a new bond total in the amount of \$293,000. **JTD. [Supp. 11/14/17 Petitioner accepts a bond of \$293,000.00]**
7. Notice is complete.
8. ~Proposed Order: 11/14/17

RECOMMENDATION:

Court's discretion. \$293,000 bond.

(nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 04/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1100815

CASE NAME: LUIS F AVALOS SPECIAL NEEDS TRUST

SEE ALSO 1

HEARING:

Accounting Review by ***

COUNSEL:

BANK OF THE WEST (PET)...BURGH, BALIAN & BERGSTEIN
LUIS F AVALOS SPECIAL NEEDS TRUST (TRU)...
NOREEN T FONTAINE ESQ (PET/STE)...NOREEN T FONTAINE

GENERAL INFORMATION

Continued from **10/12/17**. Non-appearance by counsel.

Continued from 11/14/17 and 01/08/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 3rd SNT Account by Noreen Fontaine, Successor Trustee, approved on 10/22/15.
2. **Need** 4th SNT Account beginning with 09/01/15.

RECOMMENDATION

Inquire status.

(/lc/nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 04/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1300190

CASE NAME: NORMAN FRED AND RAMONA ROSE STREY FAMILY TRUST

SEE ALSO 4

HEARING:

Hearing Re: Confirmation of Settlement

COUNSEL:

LYLE STREY	(PET)...GREGORY T ANNIGIAN
THE NORMAN FRED AND RAMONA ROSE STREY FAMILY TRUST (TRU)...	
DUAYNE DALE BLISS	(PET)...RICHARD G ANDERSON
TERRY STREY	(BEN)...ZUMBRUNN LAW CORPORATION
LYLE STREY	(PET)...GREGORY T ANNIGIAN
PAULA ANN KENT	(PET)...PRO/PER
LINDA M. ROGERS	(TEE)...PRO/PER

GENERAL INFORMATION

Continued from 02/26/18. Stipulation to be filed.

THIS CASE SET FOR HEARING ON Confirmation of Settlement

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

1. On 12/07/17 a stipulation was reached and read into the record.
2. **Need** written settlement and order submitted by Attorney Gregory Annigian.

RECOMMENDATION

Inquire status.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 04/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1300190

CASE NAME: NORMAN FRED AND RAMONA ROSE STREY FAMILY TRUST

SEE ALSO 3

HEARING:

FIRST FORMAL Account and Report of LYLE STREY and Petition for allowance of fees filed.

COUNSEL:

LYLE STREY	(PET)...	GREGORY T ANNIGIAN
THE NORMAN FRED AND RAMONA ROSE STREY FAMILY TRUST (TRU)...		
DUAYNE DALE BLISS	(PET)...	RICHARD G ANDERSON
TERRY STREY	(BEN)...	ZUMBRUNN LAW CORPORATION
LYLE STREY	(PET)...	GREGORY T ANNIGIAN
PAULA ANN KENT	(PET)...	PRO/PER
LINDA M. ROGERS	(TEE)...	PRO/PER

GENERAL INFORMATION:

Continued from **03/27/17**, **06/05/17**, **07/31/17** and **10/30/17**.

Continued from **12/07/17**. Settlement reached and read into the record.

Continued from 02/26/18. Stipulated settlement to be filed.

THIS CASE IS SET FOR HEARING ON [**Amended 07/31/17**] 1st Account by Successor Trustee, Lyle Strey.

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

1. Accounting period 07/15/15 to 12/07/16.
2. Assets on Hand \$130,843.00 consisting of cash.
3. Trustee does not request compensation.
4. Petition indicates Attorney Annigian has been paid \$14,170.00 [LF, p. 8 & 17] for fees and costs. Billed at \$360/hour for 37.40 hours' attorney time. Itemized [Supp. 07/31/17 LF pgs.7-13]. Does Court wish to ratify fees? JTD
5. Disbursements include items usually considered overhead or not normally allowed. However, petitioner is not seeking fees.
6. Bank statement covering 12/07/16 appears to be greater; \$147,778.50, than assets stated as \$130,843.00. [Supp. 10/27 LF pg. 25]. **Need** corrected accounting or reconciliation of statement.
7. **Objections filed by Duayne Dale Bliss on 02/23/17.**

8. No proposed order. Submit Order after Hearing.

RECOMMENDATION: Matter is contested.

Matter is contested. Need to clear note 6. If approved, set next hearing for Accounting Review **01/07/19**.

(nb/lc/ww)

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 04/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1501036

VACATED

CASE NAME: MTR OF FRECIA FRESNIDO SICILIA

HEARING:

Accounting Review by ***

COUNSEL:

MARK GIUSEPPE SICILIA (PET)...CANDICE A GARCIA-RODRIGO
FRECIA FRESNIDO SICILIA (DEC)...
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP)...

(ww)

Future hearing dates: 05/09/18 Probate status report filed.

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 04/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600195

CASE NAME: MTR OF JOSE GONZALES ALCALA

HEARING:

FIRST AND FINAL Account and Report of STEVEN C ALCALA and
Petition for allowance of fees filed.

COUNSEL:

STEVEN C ALCALA (PET)...PATTERSON LAW FIRM, APC
JOSE GONZALES ALCALA (DEC)...
SURETEC INSURANCE CO (TP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Statutory and Extraordinary Fees; Reimbursement of Costs and for Final Distribution by Steven Alcala, son/administrator

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

- 1 Assets on hand: \$232,340.36 in cash. **(Supp. 03/15/18 that additional amounts of \$350.00 for tax preparation and \$86.02 should be deducted from assets on hand.)**
- 2 Current bond of \$20,000.00 is filed.
- 3 Petitioner and Attorney request statutory fees of \$7,660.00. Calculated.
- 4 Attorney request extraordinary fees of \$997.50 for 306 hours of attorney time at \$350.00/hour; however, the fees do not appear to qualify as extraordinary under CRC 7.703. Itemized. [LF pg. 13] **JTD**
- 5 Attorney requests reimbursement for advanced costs in the amount of \$3,471.45; however, the following issues exist: Itemized. [LF pg. 14]
 - a. A filing fee is not charged for filing of a bond waiver, supplement to the petition for probate, notice of petition to administer, notice of hearing, or an inventory & appraisal.
 - b. Need explanation of court filing fees on 02/26/16 and 05/26/16 as no description is provided.
 - c. The First and Final accounting wasn't filed until 03/02/18 and not 01/30/18 as indicated.

- d. The Court has no record the Ex Parte petition for final discharge indicated on 01/30/18 and there would be no fee for it when received.
- e. Court may wish to inquire if “filing fees” are Attorney runner service fees as ICMS only reflects a total of \$1,072.00 in Court filing fees?

Need verified supplement.

- 6 Petitioner indicates that disbursements were made from the estate for airfare to Mission Valley Bank and for a locksmith to open the decedent’s safe deposit box in the amount of \$726.00 [LF pg. 20] **JTD**
- 7 Petitioner requests that the share as to Laura Alcala Brent be distributed to Lisa Pereau, trustee of the Laura Alcala Brent Special Needs Trust dated June 2, 2017, as Laura is disabled and receives state assistance. [LF pg. 11] **JTD**
- 8 Petitioner requests to be exonerated from any further liability upon execution of the Order Settling First and Final Account; however, petitioner is generally liable until official discharge by the Court. **JTD**
- 9 **Need** bank statements verifying date of death balances per Local Rule 20-908 for Bank of America account #s 7947, 7056 and Mission Valley Bank Account in support of the Inventory and Appraisals.
- 10 Notice given.
- 11 No proposed order.

RECOMMENDATION:

Need to clear notes 5 & 9 then Court’s discretion. If approved, Court to set hearing on filing of receipts and final discharge for **04/22/19**.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 04/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700182

CASE NAME: JOHN TAI-VAN NGO

HEARING:

Petition for Final Distribution and Waiver of Account and Report
of TINA BUI and Petition for allowance of fees filed.

COUNSEL:

TINA BUI (PET)...LAW OFFICES OF DAVID TANG
JOHN TAI-VAN NGO (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of
Account and for Fees by Tina Bui, spouse.

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

1. Assets on Hand appear to be \$0 as the only asset was real property that was confirmed to petitioner by the approval of the Spousal Property Order on 08/22/17.
 - a. Does Court wish for a Petition to Terminate Estate due to Lack of Assets be filed? **JTD**
2. Petitioner waives statutory compensation.
3. Attorney requests statutory fees of \$7,800.00. Calculated.
 - a. Court's discretion re: statutory fee as only asset passed by spousal property petition. **JTD**
4. Final Inventory and Appraisal filed 07/07/17; however, the real property was not appraised by the probate referee. **JTD**
5. Proposed Order: 03/08/18 need statement re: debts paid, notice per Pr.C. § 9202

RECOMMENDATION

Court's discretion. If approved, set hearing re receipts and final discharge for **04/22/19**.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 04/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700464

CASE NAME: MTR OF DENNIS JONES

HEARING: First & Final Account and Report of SHELLY E PEEBLES and
Petition for allowance of fees filed.

COUNSEL:

SHLLEY E PEEBLES (PET)...GEORGINA LEPE
DENNIS JONES (DEC)...

Waiver of Court Fees and Costs filed by SHELLY E PEEBLES is GRANTED
TOTAL FEES WAIVED TO DATE: \$930.00

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account, Petition for Fees, and for
Final Distribution by Shelly Pebbles, daughter/administrator

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

- 1 Accounting period: 08/10/17-02/14/18
- 2 Assets on hand: \$42,529.94 in cash which includes the deduction of \$20,500.00
preliminarily distributed to petitioner. **See note 6.**
- 3 Current bond is \$180,000.00. Sufficient.
- 4 Petitioner and Attorney request statutory fees of \$6,700.00 each. Calculated.
- 5 Attorney requests reimbursement for advanced costs in the amount of \$1,281.00.
Generally described. [LF pg. 6] **JTD**
- 6 Petitioner has advanced herself the total of \$20,500.00 as preliminary distribution a
without Court order. [LF pgs. 6 & 12] **JTD**
- 7 Petitioner requests to withhold \$1,500.00 as a reserve for closing costs. **JTD**
- 8 Notice is complete.
- 9 Proposed order: 04/10/18 need statement re: notice per Pr.C. § 9202

RECOMMENDATION:

Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge
for **04/22/19.**

(ww)

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

DATE: 04/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700514

CASE NAME: BYRON ACUNA

HEARING: First and Final Account and Report of ERWIN ALAN ACUNA and
Petition for allowance of fees filed.

COUNSEL:

ERWIN ALAN ACUNA (PET)...BANKS GARCIA & JANIS
BYRON ACUNA (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Waiver of Account, Petition for
Fees and for Final Distribution by Erwin Acuna, son/administrator

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

- 1 Assets on hand: 324,743.36 in cash.
- 2 Final Inventory and Appraisal filed 04/05/18; however, the follow issues are present:
 - a. Bank statements for account #7942 and #1294 provided for the statement period of 03/17/17-04/18/17. Does Court wish to require the statement that included the date of death as required per Local Rule 20-908? **JTD**
- 3 Petitioner and Attorney request statutory fees of \$9,560.94; however, gains, receipts and/or losses were not included in the calculation. Need corrected calculation. **(Supp. 04/05/18 gain on sale of real property was \$11,186.35, however, both petition and attorney waive any increase in the statutory fee.)**
- 4 Petitioner indicates that Attorney was already reimbursed \$912.02 for advanced costs. General described. [LF pg. 6] **JTD**
- 5 Petitioner requests to withhold \$1,000 in closing costs. [LF pg. 6] **JTD**
- 6 Petitioner requests to advance a reserve of \$500 for preparation of final tax returns in the petition prayer. [LF pg. 8] **JTD**
- 7 Notice given.
- 8 No proposed order.

RECOMMENDATION:

Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge for **04/22/19**.

(ww)

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

DATE: 04/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700794

CASE NAME: HIAM A FEHMI

HEARING:

Petition for to determine heirship & entitlement to estate distribution

COUNSEL:

AMINE P FEHMI	(PET)...JOHN G YPHANTIDES
HIAM A FEHMI	(DEC)...
ALAN YAGHDJIAN	(PET/ADM)...JOHN G YPHANTIDES

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Determine Heirship and Entitlement to Estate Distribution by Administrator, Alan Yaghdjian, friend ["Petitioner"]. Pr.C. § §11700

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

1. Petitioner is the Administrator of Decedent's estate and indicates that the decedent owned real property in the country of Lebanon that was titled solely in her name as her sole and separate property.
 - a. Does Court wish to require a description or value of said property? **JTD**
2. Petitioner is requesting an order confirming that Amine Fehmi, surviving spouse, and Mary Anne Fehmi, daughter are each intestate heirs and are entitled to distribution of 50% each of the residue of the estate consisting of the separate property of the decedent.
3. Notice given.
4. No proposed order.

RECOMMENDATION:

Court's discretion.

(ww)

Future Hearing: 1/16/19 Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 11

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

DATE: 04/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800224

CASE NAME: Haskell L Herndon

HEARING:

Petition to determine succession to Real Property

COUNSEL:

HASKELL L HERNDON Jr (PET)...PAUL HORN
HASKELL L HERNDON (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Haskell Herndon, Jr., son.

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

1. Petitioner seeks 100% interest, in decedent's 50% interest; in real property per intestate succession.
2. Petitioner indicates that decedent's spouse is deceased and that he is the sole heir.
3. No proposed order.

RECOMMENDATION

Court's discretion.

(ww)

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

DATE: 04/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800240

CASE NAME: LUCKY CHRISTOPHER EBEIGBE

HEARING:

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

COUNSEL:

THOMPSON EBEIGBE (PET)...PRO/PER
LUCKY CHRISTOPHER EBEIGBE (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Thompson Ebeigbe, son

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

1. All heirs allegedly waive bond; however, **need** clarification of note 2. Net value of the estate consists of \$106,000.00 of which \$6,000.00 is personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. Section 5 indicates that there is issue of a predeceased child, however, none is listed in section 8. **Need** verified supplement.
3. **Need** Notice to Petition to Administer Estate and proof of service.
4. **Need** proof of publication
5. ~Proposed Form Order: 03/14/18

RECOMMENDATION

Need to clear notes 1-4. Court's discretion re bond. If approved, set Accounting/Status Review **06/24/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 13

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

DATE: 04/16/18 TIME: 8:30 DEPT: S36P

CASE#: TRU PS1800046

CASE NAME: THE DENNIS M PUSCH AND SHARLENE A PUSCH TRUST

HEARING:
Petition for TO APPOINT SUCCESSOR TRUSTEE

COUNSEL:
MICHELE HAMILTON (PET)...FULLERTON LEMANN SCHAEFER & DO
THE DENNIS M PUSCH AND SHARLEN A PUSCH TRUST (TRU)...

Currently under review by Legal Research

LR

NOTICE:
Notice is complete.

(ww)

Superior Court of Calif, County of San Bernardino
Page: 13A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 04/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600776

CASE NAME: MTR OF EUGENE ALLEN RANSOM

HEARING: Petition for TO VACATE ORDER OF CONFIRMATION OF SALE OF REAL PROPERTY

COUNSEL:

ERICKA RANSOM (PET)...DAVID SARAZEN
EUGENE ALLEN RANSOM (DEC)...
TERESA RANSOM (PET/OBJ)...MILES & HATCHER

THIS CASE IS SET FOR HEARING ON Petition to Vacate Order Confirming Sale of Real Property per Pr.C. § 10351(a).

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

1. Petitioner requests that the Court vacate the order of confirmation of sale of real property granted on February, 25th, 2018 and make an order confirming sale to a new bidder.
2. The buyer named in the order has cancelled the sale as they were unable to obtain a loan.
3. The cancellation is attached as Exhibit A [LF pg. 6] and is not a default therefore petitioners indicate that they are not seeking damages pursuant to Pr.C. § 10350.
4. Murray and Associates, Properties LLC has submitted a bid of \$295,000.00, which is the same price as originally reported and in the same manner prescribed in the original notice of sale.
 - a. The purchase agreement is attached as Exhibit B. [LF pgs. 8-18]
5. The original Report of sale is attached as Exhibit C [LF pgs. 20-22]. There are no changes to the report other than the buyer.
6. Proof of service is attached to the petition; however, **need** Notice of Hearing and proof of service per Pr.C. § 10351(b).
7. No proposed order.

RECOMMENDATION:

Need to clear note 6, then Court's discretion.

(ww)

Future Hearing: 6/25/18 Probate Status Report

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

Superior Court of Calif, County of San Bernardino

Page: 14

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

CONSERVATORSHIPS

DATE: 04/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1200115

CASE NAME: MTR OF GLENN COFIELD

HEARING:

Conservatorship Compliance Review Hearing on SUPPLEMENTAL
PETITION FOR CONSERVATORSHIP of DUANE COFIELD

COUNSEL:

GLEN COFIELD

(CEP/CTP/CEE)...CRAIG M PARKER

WILLIAM COFIELD

(CPE/CP)...KYLE WOOLDRIDGE

FRANCES COFIELD

(CPE)...KYLE WOOLDRIDGE

DUANE COFIELD

(CP)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Duane Cofield, son, appointed successor conservator of the person only on 09/11/17, no bond.
2. **Need** Notification of Conservatee's rights per Pr.C.§1830(c).
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C. §2352.5.
5. **Note:** Post-Move Notice filed 11/08/17 reflecting that conservatee now resides in Gardena, California as of 10/02/17.

RECOMMENDATION

Need to clear notes 2-4 then Court's discretion.

(ww)

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

DATE: 04/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300160

CASE NAME: Louise Evelyn Garde

HEARING:

Accounting Review by ***

COUNSEL:

MELODIE Z SCOTT	(CPE)...J. DAVID HORSPOOL
LOUISE EVELYN GARDE	(CEP)...JENNIFER M DANIEL
NEIL GARDE	(SC/CPE)...KEVIN A MCKENZIE
GILBERT M GUTIERREZ	(PET)...
JENNIFER M. DANIEL	(PET)...JENNIFER DANIEL

GENERAL INFORMATION

Continued from 12/20/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 5th Account of Neil Garde, son, approved on 06/30/16.
2. Notice of Conservatee's death filed 07/26/17.
3. **Need** 6th and final account with pre-death and post-death accounting periods per Pr.C. § 2620 beginning with date of 10/01/15.

RECOMMENDATION

Inquire status.

(lh/ww)

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

DATE: 04/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600284

CASE NAME: MTR OF JANICE ANNE PRAMSCHUFER

SEE ALSO 17

HEARING:

Hearing Re: PETITION TO TERMINATE CONSERVATORSHIP ETC

COUNSEL:

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

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

XREF: CONPS1600244 (Barbara Pramschufer)
FAMSS1706884 (Barbara Pramschufer-n-Tony Hameed Ullah)
CIFDS1700057 (Pramschufer vs Ullah)

GENERAL INFORMATION

Continued from 11/02/17 and 11/13/17.

THIS CASE SET FOR HEARING ON Petition to Terminate Conservatorship of Estate, Waiver of Accounting Pr.C. §§ 1860, 2628 by Susan and Andrew Pramschufer, co-Conservators.

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

1. Co-Conservators, Susan and Andrew Pramschufer [siblings], seek termination of estate. Conservatee's mother Barbara Pramschufer allegedly misappropriated conservatee's assets. Co-Conservators wish to retain conservatorship of person only.
2. Assets on hand \$8,074, cash.
3. Estate appears to qualify for a waiver under Pr.C. § 2628. Assets consist of public benefits.
4. **Need** amended letters if approved.

5. Notice given.
6. No proposed order. Submit after hearing.

RECOMMENDATION

If approved, set Accounting/Status Review for **final accounting for 11/19/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/cs/ww)

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

DATE: 04/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600284

CASE NAME: MTR OF JANICE ANNE PRAMSCHUFER

SEE ALSO 16

HEARING: Petition for (Second) Attorney's Fees and for Order Directing Payment to Court Appointed Counsel

COUNSEL:

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

XREF: CONPS1600244 (Barbara Pramschufer)

FAMSS1706884 (Barbara Pramschufer-n-Tony Hameed Ullah)

CIFDS1700057 (Pramschufer vs Ullah)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Second Petition for Attorney's Fees by Donnasue Smith Ortiz.

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

1. Petitioner, Donnasue Smith Ortiz, was appointed counsel on 11/02/16
2. Petitioner's 1st petition for fees covering the period of 11/02/16-07/25/17 was approved on 11/14/17.
3. Petitioner requests fees for the period of 07/31/17-02/26/18 of \$9,243.75 for 27.05 hours at \$125/375 per hour for paralegal and attorney services respectively. Itemized [Pet. 03/01/18 LF pgs. 7-9]. **JTD**
4. Notice given.
5. **Court to see Response of Conservatee, Barbara Pramschufer in case CONPS1600244, filed 03/19/18.**
6. **Court to see Response of co-conservator, Andrew Pramschufer filed 03/27/18 as it indicates that conservator does not object to the petition but that the estate does not have the ability to pay said fees.**
7. ~Proposed Order: 03/01/18

RECOMMENDATION

Court's discretion.

(ww)

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

DATE: 04/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600284

CASE NAME: MTR OF JANICE ANNE PRAMSCHUFER
SEE ALSO 16, 17

HEARING:

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

COUNSEL:

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

Request for Waiver of Court Fees and Costs filed by JANICE ANNE PRAMSCHUFER is GRANTED
Fee waiver amount due \$961.00
\$465.00 for petition for conservatorship on 09/21/16
\$465.00 for first account and report on 03/15/17
\$31.00 for fax fees

XREF: CONPS1600244 (Barbara Pramschufer)
FAMSS1706884 (Barbara Pramschufer-n-Tony Hameed Ullah)
CIFDS1700057 (Pramschufer vs Ullah)

GENERAL INFORMATION:

Continued from 04/03/18. To trail matter with 04/16/18 hearing.

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

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

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

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

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

RECOMMENDATION: Trail to 04/16/18

Need to clear notes then Court's discretion. If approved, set next hearing for receipts and final discharge on **04/22/19**

(nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 18

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 04/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700166

CASE NAME: SAL JOE ROMERO

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of SABINA SOLIS

COUNSEL:

SABINA SOLIS

(PET)...JEREMIAH RAXTER

SAL JOE ROMERO

(CEE)...WALTER T. MOORE

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Sabrina Solis, non-relative/common law spouse, appointed conservator of the person only on 09/11/17, no bond.
2. **Need** Notification of Conservatee's rights per Pr.C. §1830(c).
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C. §2352.5.

RECOMMENDATION

Need to clear notes 2-4.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 19

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

DATE: 04/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700174

CASE NAME: MTR OF AARON DOUGLAS SASS

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of STACEY SASS

COUNSEL:

STACEY SASS (CP)...DUANE P BOOTH
AARON DOUGLAS SASS (CTP)...J. DAVID HORSPOOL

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Stacey Sass, mother, appointed conservator of the person only on 09/11/17, no bond.
2. **Need** Notification of Conservatee's rights per Pr.C. §1830(c).
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION

Need to clear notes 2-4.

(ww)

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

DATE: 04/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700416

CASE NAME: MTR OF LESLIE ONTIVEROS

HEARING:

Petition for Appointment of Conservator

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
LESLIE ONTIVEROS (CEP)...DAVID J HORSPOOL

GENERAL INFORMATION

PG appointed temporary conservator of the person and estate on 12/04/17.

Continued from 02/26/18. Leslie Ontiveros objects to conservatorship. Court appoints Donnasue Ortiz as guardian ad litem for proposed conservatee.

THIS CASE SET FOR HEARING ON [**Amended filed 01/11/18**] Petition for Appointment of Conservator person and estate by PG.

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

1. No bond- PG.
2. Petitioner seeks Pr. C. § 2590 powers to sell real or personal property of the estate and proceeds to be used for Conservatee's care and personal needs.
3. Petitioner seeks medical and dementia powers; however, dementia attachment to petition and Capacity Declaration is missing and proposed conservatee doesn't appear to have dementia. Court to inquire if conservatee has dementia.
 - a. Court to see Capacity Declaration filed 11/13/17.
 - b. David Horspool appointed as counsel. Report of counsel filed 11/20/17.
4. Petitioner seeks authority to deposit up to \$5,000.00 in an irrevocable burial trust and authority to abandon and/or donate personal property with value of \$300.00 or less; storage or a sale would be a burden on the estate.
5. Citation and proof of service filed on 01/16/18.
6. **Need** Notice of Hearing and Proof of service of Amended petition as to Sandy Turner, and Madison Ontiveros, daughter.
7. **Need** Report of GAL Donnasue Ortiz.
8. CI report filed 01/19/18.
9. ~Proposed Form Order: 11/13/17

RECOMMENDATION

Need GAL report and to clear note 6 then Court's discretion. If approved, set hearing for Compliance Review for **11/19/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C. §1830(c); Level of Care and Care Plan per Pr.C. §2352.5; Inventory & Appraisal, and Proof of Service if 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 **06/24/19**. Any accounting to be filed 30 days in advance.

(ww)

Superior Court of Calif, County of San Bernardino
Page: 21 add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 04/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800066

CASE NAME: MTR OF ANDREW MICHAEL JIMENEZ

HEARING: Petition for Appointment of Conservator

COUNSEL:

ELIZABETH J JIMENEZ (CP)...PRO/PER
ANDREW MICHAEL JIMENEZ (CTP)...JAMES B CHURCH

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator, of the person only, by Elizabeth Jimenez, [mother/Petitioner].

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

1. Person only- no bond.
2. Petitioner seeks powers re habilitation, treatment, training, medical etc. JTD
3. 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
4. Petitioner seeks civil rights be limited without court order. JTD
5. Petitioner seeks medical powers. Capacity Declaration filed 03/22/18; however, item 2 is missing office telephone number.
6. Proposed conservatee is developmentally disabled. **Need** report of James Church, court appointed counsel.
7. Proposed conservatee is developmentally disabled. **Need** IRC report.
8. Citation with proof of service filed 03/22/18.
9. Notice given.
10. **Need** Attachment 14 to Conservator Screening form.
11. **Need** Certificate of Completion of the Conservatorship Training Class.
12. **Need** Court Investigator report.
13. ~Proposed Form Order: 03/09/18.

RECOMMENDATION

Need to clear notes 10- 12. If approved, set hearing for Compliance Review for **11/19/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 04/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600180

CASE NAME: MARLIN DELAINE SPEARS

HEARING:

Probate status report filed.

COUNSEL:

DELAINA M SPEARS	(PET)...SANFORD H. MARGOLIN
MARLIN DELAINE SPEARS	(DEC)...
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP)...	
ZUMBRUNN LAW CORPORATION	(PRO/PER)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by daughter, Delaina Spears
[Administrator/Petitioner]

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

1. Petitioner alleges the estate is not in a condition to be closed as there is a pending Settlement Agreement as result of a partition of real property.
2. Petitioner indicates a final petition to close the estate will be filed within 60 days.
3. Inventory and Appraisal filed 01/03/17.
4. **Need** Notice of Hearing and proof of service in accord with Pr.C. § 12201.
Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. § 10950.
5. No proposed order. Submit Order after hearing.

RECOMMENDATION:

Need to clear required notice. If approved, set next Accounting/Status Review for **06/04/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(cs)

Future Hearings:

06/06/18 Receipt of Settlement/Proof of Sale

11/30/18 Accounting Review

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

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

DATE: 04/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600729

CASE NAME: MTR OF MEHDI PAKZAD

HEARING: First and Final Account and Report of JASON PAKZAD and Petition for allowance of fees filed.

COUNSEL:

JASON PAKZAD (PET)...THOMAS W DOMINICK
MEHDI PAKZAD (DEC)...
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON First and Final Waiver of Account and Petition for allowance of Fees, by son, Jason Pakzad [Administrator/Petitioner]

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

1. All heirs waive accounting.
2. Assets on Hand \$107,663.93 consisting of \$103,413.93 cash and a 2002 Infinity.
3. Statutory fees in the amount of \$9,365.38 requested. Calculated.
4. Petitioner requests reimbursement of costs advanced of \$5,584.50. Itemized [LFp.28]. JTD
5. Petitioner's mother, Cheryl Pakzad requests reimbursement of costs advanced for mortgage payments, attorney fees paid and carpet cleaning in the amount of \$11,448.85. Itemization indicates amount is due to petitioner, Jason Pakzad. Court to clarify. [LF,p.30] JTD
6. Attorney requests extraordinary fees of \$1,469.50 for services rendered in connection with tenant issues, eviction action and the sale of real property. Billed at \$350/hour for a total of 3.35 hours' attorney time and \$110/hour for a total of 2.70 hours' paralegal time. Itemized [LF, p.25-26]. JTD.
7. Personal representative seeks reserves of \$1,500. JTD
8. Notice given.
9. ~Proposed Order: 02/23/18

RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **04/22/19**

(cs)

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 04/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600969

CASE NAME: MTR OF GARY RICHARD ZITZNER

HEARING:

Report on Waiver of Account and Report of DAWN ELDEVIK and
Petition for allowance of fees filed.

COUNSEL:

DAWN ELDEVIK (PET)...WILLIAM M NASSAR & ASSOCIATES
GARY RICHARD ZITZNER (DEC)...

THIS CASE SET FOR HEARING ON First and Final Waiver of Account and Petition for allowance of Fees, by daughter, Dawn Eldevik, [Administrator/Petitioner]

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

1. All heirs waive accounting
2. Assets on Hand \$32,405.49 cash
3. **Need** bank statement to support ending balance per local rule 20-908.
4. **Need** statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary (Pr. C. § 1064 (a)(4)).
5. **Need** verified supplement indicating if cash has been invested and maintained in an interest bearing account. Pr.C.§ 1064(a)(5).
6. **Need** statement whether the estate is solvent.
7. Petitioner waives statutory compensation.
8. Petitioner requests reimbursement of \$5,575.80 for advanced payments made. Itemized [LF,p.24]. JTD
9. Statutory fees in the amount of \$5,800 requested. Calculated.
10. Personal representative seeks reserves of \$2,000. JTD
11. Proposed Order 02/22/18. Need department number and name of Judge.

RECOMMENDATION

Need to clear notes 3-6, then Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **11/19/18**. Vacate accounting review.

(cs)

Future Hearing: 4/26/18 Accounting Review - **vacate hearing**.

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

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 04/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700270

CASE NAME: THE REVOCABLE LIVING TRUST OF NICOLE MARIE DUBERG

HEARING: Re: DETERMINATION OF GAL/PLACEMENT OF FUNDS

COUNSEL:

BRANDY MOODY (PET)...FARHAT LAW FIRM, APC
THE REVOCABLE LIVING TRUST OF NICOLE MARIE DUBERG (TRU)...
MINOR CHILDREN (MIN)...LENITA A SKORETZ

XREF: GARPS1600582 *MTR OF MAKAYLAH MARIE DUBERG*

GENERAL INFORMATION:

Continued from 02/05/18 Counsel report Chase has placed funds in an investment account instead of a blocked account. The Court will allow investment account only if it is restricted to conservator investments and the bank is acting as a fiduciary, and if account is blocked. Counsel report guardianship of the estate of both minors will be filed. Ms. Skoretz to speak with father of Andrew to determine if he has any objection to petitioner's requesting guardianship of the estate as to both minors. The Court notes guardianship of the person is currently before Judge Reichert. The Court will hear guardianship of the estate.

THIS CASE SET FOR HEARING ON Determination Of GAL/Placement Of Funds

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

1. Matter set on 11/06/17 wherein Court approved all funds being placed in blocked account in the name of the trust in lieu of bond.
2. Counsel to determine whether social security death benefits are going to be paid for minor's support.

RECOMMENDATION:

Inquire status.

(cs)

Future Hearing: 7/23/18: Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 04/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700998

CASE NAME: EULOGIO L BANUELOS

HEARING: Petition to determine succession to Real Property

COUNSEL:

RALPH BANUELOS (PET)...EDWARD B FISCHER & ASSOCIATES
EULOGIO L BANUELOS (DEC)...
HENRY MAURICIO JR (OBJ)...THE WERNER LAW FIRM

Currently under review by Legal Research.
(LR)

(CS)

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 04/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701037

CASE NAME: DORIS E TESSIER

HEARING:

Petition to determine succession to Real Property

COUNSEL:

DANIEL E TESSIER JR (PET)...MICHAEL W BROWN
DORIS E TESSIER (DEC)...

GENERAL INFORMATION:

Continued from 02/06/18 at request of counsel to clear probate notes. Notice to be given by Mr. Brown.

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by son/executor/trustee, Daniel E. Tessier, Jr. ["Petitioner"]

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

1. Petitioner is the trustee of a trust that is a devisee under decedent's will. Petitioner requests a determination that decedent's real property located at Big Bear in San Bernardino County, pass to petitioner without administration. Petitioner attaches a copy of decedent's pour-over will confirming that Decedent's trust is the devisee of subject property.
2. Notice given.
3. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion.

(nb/cs)

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 04/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800237

CASE NAME: CHRISTINE ESTELLE BUCH

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

COUNSEL:

ERIC MUSTAD (PET)...KATHRINE D STAPLETON
CHRISTINE ESTELLE BUCH (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by cousin, Eric Mustad, [Administrator/Petitioner]

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

1. Petitioner seeks bond of \$75,000. Estate value is \$75,000 in real property
2. Petitioner indicates decedent was a resident of Carson City, Nevada and section 3a of petition indicates decedent was resident of Carson City Nevada. **Need** further clarification via verified supplement.
3. **Need** Proof of Subscribing Witness as decedent's will was drafted and executed in County of Douglas, Nevada and not signed "under penalty of perjury under the laws of the State of California".
4. The will conditionally incorporates decedent's Trust. **Need** a copy of the trust and include a list of Trust beneficiaries for notice purposes.
5. **Need** Notice to Petition to Administer Estate and proof of service.
6. **Need** proof of publication
7. ~Proposed Form Order: 03/13/18

RECOMMENDATION

Need to clear notes 2-6, Court's discretion re bond. If approved, set Accounting/Status Review for **06/24/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 04/16/18 TIME: 8:30 DEPT: S37P

CASE#: VPR VS003090

CASE NAME: ESTATE OF DOROTHY M PATRICK

HEARING:

Accounting Review by ***

COUNSEL:

LISA DIANE HOFFMAN (PET)...PRO/PER
DOROTHY M PATRICK (DEC)...
JEANNE E. KENNEDY (TP)...CALDWELL, KENNEDY & PORTER, A.

GENERAL INFORMATION:

Continued from **04/14/16**. Counsel to subpoena someone from the Assessor's Office to be present at the next hearing date of 10/17/16.

Continued from **10/17/16, 12/19/16, 03/27/17** and **06/19/17** at request of counsel.

Continued from **08/28/17** for issues to resolve or motion to be relived to be filed. Lisa Hoffman is ordered to be present.

Continued from **11/06/17** Lisa Hoffman is cited to appear at next hearing. Should she fail to appear, the bench warrant may be issued for her arrest. Substitution of attorney to be re-filed/located. Citation issued

Continued from 02/05/18 at request of counsel to clear probate notes/accounting with accountant.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 6th Report of Status of Administration by Lisa Hoffman, executor, approved on 04/14/16.
2. Substitution of Attorney filed.
3. Proof of unsuccessful service of Citation to Lisa Hoffman filed 01/29/18.
4. **Need** accounting filed.

RECOMMENDATION:

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

Superior Court of Calif, County of San Bernardino
Page: 8A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 04/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800258

CASE NAME: WILLIAM J SANDERS

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL IAEA

COUNSEL:

LISA M SANDERS (PET)...RODRIGO LAW FIRM
WILLIAM J SANDERS (DEC)...

GENERAL INFORMATION

Letters of Special Administration issued to Lisa Sanders on 03/28/18 with no iaea, no bond.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Lisa Sanders, daughter

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

1. All heirs waive bond. Net value of the estate consists of \$134,000.00 of which \$6,000.00 is personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. Jayson Sanders, son, waives notice.
3. ~Proposed Form Order: 03/19/18

RECOMMENDATION

RFA. Court's discretion re bond. If approved, set Accounting/Status Review **07/15/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino
Page: 9

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

DATE: 04/16/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1601186

CASE NAME: MTR OF THE BROWN TRUST U/D/T DATED OCT 3,2000
SEE ALSO 10 11 12

HEARING:

Motion Re: NTC OF MTN AND MTN TO AMEND PETN TO BRING IN NEW
PARTY PTNER Filed by Petitioner RUTH ANITA BELL, VALERIE ANN JOHNSON

COUNSEL:

RUTH ANITA BELL (PET)...ZUBIATE BEAUCHAMP LLC
VALERIE ANN JOHNSON (PET)...ZUBIATE BEAUCHAMP LLC
THE BROWN TRUST (TRU)...
CHRISTINA BARNES (PET/OBJ)...JAMES B CHURCH

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

Currently under review by Legal Research.
(LR)

(CS)

Superior Court of Calif, County of San Bernardino

Page: 10

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

DATE: 04/16/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1601186

CASE NAME: MTR OF THE BROWN TRUST U/D/T DATED OCT 3,2000

SEE ALSO 9 11 12

HEARING:

Petition for ORDER CONFIRMING TRUST ASSETS PETITION TO
COMPEL ACCOUTNING ETC

COUNSEL:

RUTH ANITA BELL (PET)...ZUBIATE BEAUCHAMP LLC
VALERIE ANN JOHNSON (PET)...ZUBIATE BEAUCHAMP LLC
THE BROWN TRUST (TRU)...
CHRISTINA BARNES (PET/OBJ)...JAMES B CHURCH

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

Currently under review by Legal Research.
(LR)

Notice filed. Court to inquire if real property has an encumbrance, if so, Court may wish to
require notice to mortgage company.
(cs)

Superior Court of Calif, County of San Bernardino

Page: 11

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

DATE: 04/16/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1601186

CASE NAME: MTR OF THE BROWN TRUST U/D/T DATED OCT 3,2000

SEE ALSO 9 10 12

HEARING:

FIRST Account and Report of CHRISTINA BARNES and Petition for allowance of fees filed.

COUNSEL:

RUTH ANITA BELL (PET)...ZUBIATE BEAUCHAMP LLC
VALERIE ANN JOHNSON (PET)...ZUBIATE BEAUCHAMP LLC
THE BROWN TRUST (TRU)...
CHRISTINA BARNES (PET/OBJ)...JAMES B CHURCH

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

GENERAL INFORMATION

Continued from **09/13/17**. Christina Brown's name to be changed to Christina Barnes. Counsel Church stated escrow is pending. Money cannot be withdrawn from Trust Account without attorney and through court order. Counsel Church to submit order re name correction.

Continued from 03/14/18 at request of Court to clear probate notes/trail motion set. Notice to be given by Ms. Zubiata-Beauchamp

THIS CASE SET FOR HEARING ON 1st Account Current and Petition for Allowance of Fees by Christina Barnes, Trustee.

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

1. Accounting period 09/23/15 – 04/13/17.
2. Assets on hand \$4,888.82 in cash.
3. Real property in Pico Rivera is not included in accounting.
4. Christina Barnes' name appears to be Christina Brown on the record. Additionally, first line of report states Kristine Merrill is successor Trustee. **Need** verified supplement clarifying parties.
5. Page 2 of report is highly illegible. Court may wish to require new page.
6. **Need** list of beneficiaries per California Rule of Court 7.902.
7. **Objections filed by Ruth Bell and Valerie Johnson on 08/23/17, supplemental objections filed 09/07/17.**

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

8. **Reply to Objections filed by Christina Michaele Barnes on 09/21/17.**
9. **Need notice as directed by court.**
10. No proposed order. Submit after hearing.

RECOMMENDATION

Need to clear notes 4-6; matter is contested. *If court retains jurisdiction* of trust, set next Accounting review for **06/13/18**.

(lc/lh/cs)

Superior Court of Calif, County of San Bernardino

Page: 12

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

DATE: 04/16/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1601186

CASE NAME: MTR OF THE BROWN TRUST U/D/T DATED OCT 3,2000

SEE ALSO 9 10 11

HEARING:

Trial Setting Conference

COUNSEL:

RUTH ANITA BELL (PET)...ZUBIATE BEAUCHAMP LLC
VALERIE ANN JOHNSON (PET)...ZUBIATE BEAUCHAMP LLC
THE BROWN TRUST (TRU)...
CHRISTINA BARNES (PET/OBJ)...JAMES B CHURCH

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

No notes – TSC. JTD
(cs)

Superior Court of Calif, County of San Bernardino

Page: 13

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

DATE: 04/16/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700800

CASE NAME: THE CYNTHIA GRACE TAMBLIN LIVING TRUST

HEARING:

Petition for TRANSFER REAL PROPERTY INTO TRUST AFTER DEATH OF
DECEDENT

COUNSEL:

BARBARA ONTEK (PET)...PRO/PER
THE CYNTHIA GRACE TAMBLIN LIVING TRUST (TRU)...

Waiver of Court Fees and Costs filed by BARBARA ONTEK is GRANTED

Currently under review by Legal Research.
(LR)

Notice:

Need notice to Louis Ontek, Jr (alternate successor trustee), contingent beneficiaries and
lienholders. Need copy of trust with a list including all beneficiaries for notice purposes.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 14

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

DATE: 04/16/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700999

CASE NAME: CHRISTINA HOPE SAYLOR TRUST ESTABLISHED DEC 3, 200

HEARING:

Petition for TO COMPEL TERMINATION OF TRUST

COUNSEL:

CHRISTINA HOPE SAYLOR (PET)...ANDERSON & LEBLANC
CHRISTINA HOPE SAYLOR TRUST (TRU)...

Currently under review by Legal Research.
(LR)

Notice:

Need notice to Boston Safe Deposit and Trust Company of California and nominated
Trustee.

(cs)

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

DATE: 04/16/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1800007

CASE NAME: Theodora Peka Tauvalaau

HEARING: Spousal Property Petition hearing.

COUNSEL:

TIMOTEO S TAUVALAAU (PET)...ELISABETH KEMPE-OLINGER
THEODORA PEKA TAUVALAAU (DEC)...

Currently under review by Legal Research.
(LR)

GENERAL INFORMATION:

Continued from 02/05/18 at request of Counsel for legal research review.

THIS CASE SET FOR HEARING ON Spousal Property Petition hearing

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

1. Petitioner, Timoteo Tauvalaau, seeks a determination of real property passing to the surviving spouse as community property and also that community property be determined to have belonged to surviving spouse. Specifically, real property located in Rialto, CA, in San Bernardino County.
2. Attachment 7 indicates date of marriage 09/07/96. Property was purchased in 1999 with a loan obtained in Petitioner and Decedent's sister's name. In 2003 decedent's sister signed a Quit Claim Deed to take her name off title and placed title under petitioner's name alone. Decedent and Petitioner's intentions were to place the property in both of their names as husband and wife as joint tenants. They signed a Quit Claim Deed to each other on the same day. However, as a result of the way the quit claim deeds were prepared and recorded, the property was ultimately put in Decedent's name alone as her sole and separate property which was not the intention of the parties. A copy of the deeds are affixed, [LF p. 5/6].
3. Decedent died intestate with 4 issues who would also share a two-thirds distribution interest in the estate per Pr.C. §6401 if the real property is the separate property of decedent.
4. Notice given.

5. ~Proposed order: 01/04/18

RECOMMENDATION:

Court's discretion.

(CS)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 04/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS0800058

CASE NAME: In re Matter of Gloria Feaster

HEARING: Final Account and Report of CHRISTINA ERICKSON-TAUBE and
Petition for allowance of fees filed.

COUNSEL:

CHRISTINA ERICKSON-TAUBE	(PCR)...ALEX R BORDEN
GLORIA FEASTER	(PCE/CEP)...
KARIN E HORSPOOL	(PET)...HORSPOOL & PARKER
GLORIA FEASTER S.N. TRUST	(TRU)...
CHRISTINA ERICKSON-TAUBE	(CPE)...BORDEN LAW OFFICE
MELODIE Z SCOTT	(TP)...PRO/PER

CCP170.6 filed as to CYNTHIA A LUDVIGSEN

Waiver of Court Fees and Costs filed by CHRISTINA ERICKSON-TAUBE is GRANTED
TOTAL FEES WAIVED TO DATE: \$585.00

GENERAL INFORMATION:

Conservatee passed away on 01/19/17

THIS CASE IS SET FOR HEARING ON First and Final Account; Petition for Termination
and Petition for Fees by PPF, Christina Erickson-Taube, [conservator Petitioner].

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

1. Period of account: 09/01/16-04/28/17 (includes pre and post death periods).
2. Assets on hand \$0
3. Petitioner waives conservator fees due to the insolvency of the estate.
4. Petitioner requests partial reimbursement of costs of \$221.26 for payment of case manager service to Aimee Armenta on behalf of the estate by the conservator.
5. Attorney waives right to request fees for services rendered due to the insolvency of the estate.
6. **Need** residential facility statements per Pr.C. § 2620(c)(5).
7. **Need** verified declaration for acknowledgment of receipt of fees per Local Rule 20-1406(c) by Aimee Armenta.

8. **Need** statement regarding conservatee's residences during accounting per Local Rule 20-1406(a).
9. **Need** Notice of hearing.
10. The estate is insolvent as there are not assets to distribute.
11. Petitioner seeks discharge. However, discharge does not occur until the entry of final discharge order.
12. Proposed Order: Need assets on hand, accounting period, status of estate solvent/insolvent, and asset distribution. Estate cannot be terminated until final discharge has been granted.

RECOMMENDATION:

Need to clear notes 6-9, then Court's discretion. If approved, Court to set hearing on filing of final discharge for 04/22/19.

(cs)

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

DATE: 04/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1200288

CASE NAME: MARIA DE JESUS EQUIHUA

SEE ALSO 18 19 20

HEARING:

Hearing Re: PTN FOR ACCTG OF SOCIAL SECURITY FUNDS

COUNSEL:

NELIDA MILLAN	(PET)...PRO/PER
MARIA DE JESUS EQUIHUA	(CTP/CEP)...JACK B OSBORN
ROBERT EQUIHUA	(CPE/OBJ)...PRO/PER
ARCELIA GARCIA	(CPE/CE)...DONNASUE ORTIZ
MATTHEW E SHEASBY	(PET)...
COSME EQUIHUA	(PRO/PER)
WESTERN SURETY COMPANY	

Waiver of Court Fees and Costs filed by NELIDA MILLAN, ROBERT EQUIHUA, MARIA DE JESUS EQUIHUA & ARCELIA GARCIA is GRANTED

GENERAL INFORMATION:

Continued from 02/05/18. Nelida Millan to prepare order after hearing re visitation. Notice to be given by Ms. Millan

THIS CASE SET FOR HEARING ON Re: Petition for Accounting of Social Security Funds by daughter, Nelida Millan, [Conservator/Petitioner]

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

1. Conservator, requests that Roberto Equihua provide a full accounting of all cash withdraws and/or debit transactions made during the period of 06/2007 to 07/2013. Petitioner alleges Roberto had possession of conservatee's debit card and made withdrawals during that period and including while Conservatee lived with petitioner during the period of 11/12 to 07/23/13.
2. Petitioner requests that Roberto account for all of conservatee's money totaling \$60,680 and that he return any unaccounted money to the conservatee's estate with 10% interest for each year.
3. Petitioner objects to the Petition for Reimbursement filed 09/28/17 by Roberto Equihua for attorney Frank Prainito's fees. Petitioner alleges Roberto and Cosme's share of costs to pay such fees came from the non-payment of rent as it was

pointed out in the accounting filed by previous estate conservator [Petition11/02/17,LF,p7-10].

4. Petitioner objects to fees claimed by Roberto Equihua for the driveway and property taxes paid as this was paid cash from the unaccounted social security income that Roberto was withdrawing from conservatee's account and not from his own account.
5. Petition is not verified. **Need** petition to be verified per Pr.C. §1021.
6. **Need** after hearing re visitation as directed by court on 02/05/18.
7. **Need** notice of hearing and proof of service.
8. No proposed order: submit after hearing.

RECOMMENDATION:

Need to clear notes 5-7, then Court's discretion.

(cs)

Future Hearing: 6/19/18 Accounting Review for Ms. Millan

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

DATE: 04/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1200288

CASE NAME: MARIA DE JESUS EQUIHUA

SEE ALSO 17 19 20

HEARING: Re: PTN FOR REIMBURSEMENT by Nelida Millan

COUNSEL:

NELIDA MILLAN	(PET)...PRO/PER
MARIA DE JESUS EQUIHUA	(CTP/CEP)...JACK B OSBORN
ROBERT EQUIHUA	(CPE/OBJ)...PRO/PER
ARCELIA GARCIA	(CPE/CE)...DONNASUE ORTIZ
MATTHEW E SHEASBY	(PET)...
COSME EQUIHUA	(PRO/PER)
WESTERN SURETY COMPANY	

GENERAL INFORMATION

Continued from 02/05/18 at request of court to clear probate notes. Court ordered Nelida Millan to prepare a summary of each repair, the costs, the amount paid, and the source of the funds.

THIS CASE IS SET FOR HEARING ON Petition for Reimbursement, by daughter, Nelida Millan, [Conservator/Petitioner]

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

1. Petitioner requests reimbursement for an addition of 2 bedrooms, a bathroom and an increase in square footage in the dining area of conservatee's home. Receipts provided. [petition reimbursement 11/02/17LF, p. 4-51].
2. Petitioner and Conservatee agreed that reimbursement of monies would be paid back in payments through rental income, or in a lump sum thought a refinance. However, siblings (Roberto and Cosme) moved into conservatee's home and promised to pay rent; but they have not paid.
3. **Need** a summary of each repair, the costs, the amount paid, and the source of the funds as directed by Court on 02/05/18.
4. **Need** petition to be verified per Pr.C. § 1021.
5. **Need** notice of hearing and proof of service.
6. No proposed order: submit after hearing.

RECOMMENDATION

Need to clear notes 3-5, then Court's discretion.

(cs)

6/19/18: Hearing Re: Accounting Review for Ms. Millan

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

DATE: 04/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1200288

CASE NAME: MARIA DE JESUS EQUIHUA

SEE ALSO 17 18 20

HEARING: Re: Pet for proof of rental payments

COUNSEL:

NELIDA MILLAN	(PET)...PRO/PER
MARIA DE JESUS EQUIHUA	(CTP/CEP)...JACK B OSBORN
ROBERT EQUIHUA	(CPE/OBJ)...PRO/PER
ARCELIA GARCIA	(CPE/CE)...DONNASUE ORTIZ
MATTHEW E SHEASBY	(PET)...
COSME EQUIHUA	(PRO/PER)
WESTERN SURETY COMPANY	

GENERAL INFORMATION:

Continued from 02/05/18 at request of Court to clear probate notes.

THIS CASE SET FOR HEARING ON Petition for Proof of Rental Payments made to Conservatee filed by daughter, Nelida Millan, [Conservator/Petitioner]

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

1. Nelida Millan requests Robert Equihua present proof of rental payments made for the period of 01/01/05 to 05/01/13 for occupying one room in conservatee's home located 8174 Tokay Avenue, Fontana, CA 92335.
2. Nelida Millan requests that Cosme Equihua present proof of rental payments made for the period of 01/01/06 to 05/01/13 for occupying one room conservatee's home located property located 8174 Tokay Avenue, Fontana, CA 92335.
3. **Need** petition to be verified per Pr.C. §1021.
4. **Need** Notice of Hearing and proof of service.
5. No proposed order: submit after hearing

RECOMMENDATION:

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

(cs)

Future Hearing: 6/19/18 Accounting Review for Ms. Millan

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

DATE: 04/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1200288

CASE NAME: MARIA DE JESUS EQUIHUA

SEE ALSO 17 18 19

HEARING: Petition for REIMBURSEMENT by ROBERT EQUIHUA

COUNSEL:

NELIDA MILLAN	(PET)...PRO/PER
MARIA DE JESUS EQUIHUA	(CTP/CEP)...JACK B OSBORN
ROBERT EQUIHUA	(CPE/OBJ)...PRO/PER
ARCELIA GARCIA	(CPE/CE)...DONNASUE ORTIZ
MATTHEW E SHEASBY	(PET)...
COSME EQUIHUA	(PRO/PER)
WESTERN SURETY COMPANY	

GENERAL INFORMATION:

Continued from **11/06/17** Court orders Mr. Equihua file proof of payment and proof of where monies were secured from as to attorney fees for quiet title action, property taxes from January 2007 through March 2011, \$2,000 retainer to Mr. Prainito and work on the home. As to the work on the home, the Court will also require receipts. Arcelia Garcia reports all documents/paperwork concerning her time as conservator were accidentally thrown in the trash. Visitation orders made. Court relieves Matthew Sheasby as guardian ad litem.

Continued from 02/05/18 at request of Court to clear probate notes. The Court ordered ROBERT EQUIHUA provide receipts signed under the penalty of perjury from all the people he paid to work on the home. Receipts for payment to specify the work performed as well as proof of payment. Robert Equihua is to prepare an informal accounting of all withdrawals from Maria Equihua's account for the time period of June 2007 to July 2013.

THIS CASE IS SET FOR HEARING ON Petition for Petition for reimbursement by Robert Equihua, son

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

1. Robert Equihua, submits receipts for work undertaken on behalf of the estate of Maria Equihua for the period of 01/2009 to present including payment for property taxes, totaling \$20,436.00, plus interest of 10% for each year since 2010, totaling \$34,744. Itemized [LF, pgs. 8–20].

2. Question whether this is a proper petition to request reimbursement suggest court require creditors claim to be served upon conservator. JTD
3. **Need** proof of where monies were secured from as to quiet title action attorney fees; property taxes from January 2007 through March 2011; \$2,000 retainer to Mr. Prainito; and work done on the home.
4. **Need** receipts for proof of payment. Receipts are to specify the work performed as well as proof of payment.
5. **Need** informal accounting of all withdrawals from Maria Equihua's account for the period of June 2007 to July 2013.
6. **Need** notice of hearing and proof of service.
7. Petition is not verified. **Need** verified petition per Pr.C. §1021.
8. **Response filed 11/02/17 in the form of objections by Conservator, Nelida Millan. Need proof of service to Robert Equihua.**
9. No proposed Order. Order to be submitted after hearing

RECOMMENDATION

Contested matter.

Need to clear notes 3- 8.

(cs)

Future Hearing: 6/19/18 Accounting Review for Ms. Millan

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

DATE: 04/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600037

CASE NAME: MTR OF CHRIS CLAYTON JACKSON JR.
HEARING: Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of CHRISTINA JACKSON

COUNSEL:

CHRISTINA JACKSON (PET)...PRO/PER
CHRIS CLAYTON JACKSON JR (PCE)...MARK J. ANDREW FLORY

GENERAL INFORMATION:

Referred to Court Investigator for investigation and report on 04/12/16.

Continued from **07/12/16**. No appearance.

Continued from **09/20/16** by stipulation. Counsel's report to report notice of conservatee's right was sent.

Continued from **12/05/16, 02/03/17 and 04/17/17**. Counsel states that he has not located his client. There is a possibility Conservator and Conservatee are in Washington State. Attorney Flory reported last known address 1356 Watson Ave Costa Mesa, CA 92626. Referred to CI.

Continued from **10/16/17**. Court does not require a Statement of Care Plan, thus clearing probate note 2. Mr. Flory informs the Court Conservatee is currently in custody in Orange County. Pursuant to Public Guardian's request, Court relieves PG in this matter.

Continued from 12/18/17 at request of Counsel to clear probate notes. Court will keep matter in San Bernardino for now. Counsel gives oral report that Conservatee is still in custody.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Christina Jackson, sister, appointed Conservator of the person on 04/15/15 in Riverside County.
 - a. Proposed San Bernardino Letters received on 12/05/16. However, the box for "conservator" in section 1 is not checked and the Court address is incorrect? Require proper letters.
2. Determination of Conservatee's Appropriate Level of Care filed 12/22/15.
3. Court Investigator Special Report filed 04/19/17.
4. **Need** report of court-appointed counsel, Mark Flory.

5. Post-Move Notice of Change of Address filed 10/16/17; however, proof of service is not dated at signature line. JTD
6. ~Proposed letters 12/05/16.

RECOMMENDATION:

Need to clear notes 1 and 4, then Court's discretion.

(lc/nb/ww/nb/cs)

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

DATE: 04/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600098

CASE NAME: MTR OF FORTMAN S YAN
HEARING: Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ROBBIN YAN-SINGZON

COUNSEL:

ROBBIN YAN-SINGZON	(CPE)...BRYAN C HARTNELL
FORTMAN S YAN	(CEP)...WALTER T. MOORE
FORTMAN S YAN	(CPE)...BRYAN C HARTNELL

GENERAL INFORMATION

Order Appointing Temporary Conservator entered 05/17/16.

Order appointing Robbin Yan-Singzon, Conservator of the person and estate entered 07/27/16, \$20,000 bond.

Continued from **01/31/17** to clear notes.

Continued from **04/18/17**. Robbin Yan-Singzon and Fortman S Yan are ordered to be present at next hearing if required documents are not filed.

Continued from **06/20/17** at request of counsel.

Continued from **09/05/17** at request of court.

Continued from **11/13/17**. Counsel will file Inventory and Appraisal this date.

Continued from 01/17/18 at request of Court to clear probate notes. Additional bond to be posted in the amount of \$47,000.00.

THIS CASE IS SET FOR HEARING ON Compliance Review by Robbin Yan-Singzon

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

1. Section 4b to proof of service to Notification of Conservatee's Rights filed 02/21/17 is blank. **Need proper service to include copy of order.**
2. Statement of Care Plan filed 05/10/17.
3. Determination of Conservatee's Appropriate Level of Care filed.
4. Inventory and Appraisal filed 11/13/17.
5. Proof of additional bond in the amount of \$27,000 filed 02/13/18; however, Court ordered additional bond of \$47,000. **Need** proof of additional \$20,000 for a total bond of \$67,000.

RECOMMENDATION:

Need to clear note 1 and 5. Court's discretion.

(nb/lh/nb/lh/cs)

Future Hearing: 5/21/18: Accounting Review

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

DATE: 04/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600117

CASE NAME: MTR OF JEFFREY CRAIG ANDERSON

HEARING: FIRST Account and Report of DOUGLASS LEE GROVES and Petition for allowance of fees filed.

COUNSEL:

DOUGLASS LEE GROVES (CPE)...RONALD W ASK
JEFFREY CRAIG ANDERSON (CEP)...

GENERAL INFORMATION:

Continued from 02/05/18 at request of Court to clear probate notes. Court approves petitioner's request for reimbursement of costs in the amount of \$5,450 and attorney fee requests in the amount of \$10,805.89

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees, by Douglass Groves [Conservator/Petitioner]

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

- 1. Request for continuance filed 04/10/18; however, not in laserfiche at time of review.**
2. Assets on hand \$20,832.93 consisting of \$20,082.93 in cash and \$750 personal property.
3. Accounting period reported is 01/23/17-11/16/17. Amended Letters issued on 01/23/17; however, **need** accounting to begin with date of appointment on 11/29/16.
4. **Need** mandatory Summary of Account form GC-400(SUM)/GC-405 (SUM).
5. Schedule E [LF p. 21] does not include Chase checking acct ending xx8384 listed on Final Inventory and Appraisal filed 08/24/17. **Need** verified supplement.
6. Schedule E indicates Representative Payee Account; however financial bank statement not provided. **Need** same.
7. Schedule A [LF,p. 14-15 indicate unknown credits in the amount of \$8,869.60. **Need** verified supplement describing each entry.
8. Current bonds of \$20,000. Suggest bond of \$36,000. JTD.
9. Petitioner requests that the court reserve the issue of compensation of the conservator at this time.

10. Request for reimbursement of costs advanced of \$5,450.00 to attorney Ronald Ask approved on 02/05/18.
11. Attorney fee of \$10,805.89 approved on 02/05/18.
12. Notice given.
13. No proposed Order. Submit after hearing.

RECOMMENDATION:

Need to clear notes 2-6, then Court's discretion. If approved, set next hearing for Accounting Review for **06/24/19 (if one year) or 04/20/20 (if two years)**. Accounting to be filed 30 days in advanced. Note requirements of local rule 20-908.

(cs)

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

DATE: 04/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700070

CASE NAME: MTR OF OLIVIA CRAWFORD
HEARING: Petition for Appointment of Conservator

COUNSEL:

HELLEN HUNT (CP)...PRO/PER
OLIVIA CRAWFORD (CTP)...JEANNE E KENNEDY

GENERAL INFORMATION

Continued from 04/13/17. Court clarifies that petitioner does not request a change of placement of proposed conservatee. Jeanne Kennedy appointed counsel. Remove attorney Caldwell, Kennedy & Porter, APC, from case. Court orders IRC to prepare a report for the Court. Clerk's office to notify IRC.

Continued from **06/22/17**. Court requests petitioner apply for IRC for Olivia. **Counsel Rosado to assist**. Hellen Hunt appointed temporary Conservator of Estate.

Continued from **08/31/17**. Petitioner applying for IRC.

Continued from **11/08/17** for IRC application to be processed.

Continued from 01/17/18 at request of Counsel to be heard after IRC appointment.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Dr. Hellen Hunt (aunt)

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

1. Petitioner seeks medical powers. Capacity Declaration filed 03/03/17.
2. Petitioner seeks dementia powers. Report of Counsel Kennedy filed 06/14/17.
3. Petitioner alleges that proposed Conservatee is developmentally disabled. **IRC letter filed 02/08/18.**
4. Citation returned served.
5. Certificate of Completion of the Conservatorship Training Class filed 06/01/17.
6. Court Investigator report filed 04/05/17.
7. ~Proposed Form Order: 06/19/17.

RECOMMENDATION

Court's discretion. If approved, set hearing for Compliance Review for **11/19/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5 (lh/lc/lh/lc/lh/cs)

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

DATE: 04/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700197

CASE NAME: CLARENCE WARE

HEARING: Petition for CONSERVATOR OF THE PERSON AND ESTATE filed by
DIANA L MCKENZIE

COUNSEL:

LACHELLE WARE	(CPE)...PRO/PER
CLARENCE WARE	(CEP)...E JOAN NELMS
DIANA L MCKENZIE	(PET)...PRO/PER

GENERAL INFORMATION

OSC set when there was no appearance on 07/05/17. Walter Moore appointed counsel. **Continued from 08/16/17.** Court believes this case should proceed as an LPS conservatorship. Parties report to petitioner, Lachelle Waree, has left the state and abandoned this petition. Parties further report a competing petition will be filed. Parties further report Clarence Ware is currently hospitalized in Riverside Community Hospital and has been for 3 weeks. Parties attempting to have him transferred to the VA. Counsel reports he has not yet seen his client. Court relieves Mr. Moore as counsel and appoints him as Guardian Ad Litem in this matter. Remove Walter T. Moore from this case. Attorney E. Joan Nelms appointed for Clarence Ware.

Ex parte orders granted 08/28/17. Diana McKenzie appointed Temporary Conservator of person and estate, no bond.

Continued from 01/17/18 Court finds Petition #1 was dismissed 10/11/17 for lack of prosecution. Court proceeds with hearing as to Petition #2 filed by Diana McKenzie on 8/24/17. Court dispenses with probate note 20 re Screening Form. Petitioner 30 year old son is living at home and is assigned a social worker. Court dispenses probate note #21 re Supplemental Information, conservatee suffers from PTSD, substance abuse and Dementia. Hearing continued at request of Court for re-referral to Court Investigator re Petition #2 only and clear probate notes. Referred to CI for investigation and report. Citation issued to Clarence Ware who is cited and required to appear on 04/16/18 and show cause why he was placed in a locked facility. File routed to clerk's office for service of citation.

THIS CASE SET FOR HEARING ON **Petition** for Appointment of Conservator of person and estate [filed 08/24/17], by Diana L McKenzie, [sister/Petitioner]

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

1. Petitioner seeks no bond; however, did not include reasons in attachment 1c. **Need** verified supplement.
2. Petitioner seeks medical powers. Capacity Declaration filed 08/24/17.
3. Petitioner seeks dementia powers. Report of Counsel E. Joan Nelms filed 10/10/17.
4. Certificate of Completion of the Conservatorship Training Class filed 02/01/18.
5. **Need** return of Citation.
6. Notice of Hearing and Proof of Service filed 02/05/18; however, section 4a re date of mail is incomplete. **Need** corrected proof of service.
7. Post-Move Notice filed 02/05/18; however, date on item 1 is incomplete. **Need** corrected form.
8. **Court Investigator report filed 04/04/18.**
9. Proof of service of Citation issued by Court as to Clarence Ware filed 03/05/18.
10. No proposed Order submitted.

RECOMMENDATION

Need to clear notes 1, & 5-7. If approved, set hearing for Compliance Review for **11/19/18** for the filing of the required documents and hearing re Accounting Review for **06/24/19**.

Any accounting to be filed 30 days in advance.

(lc/lh/lc/lh/cs)

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

DATE: 04/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800047

CASE NAME: ERVIN AGUILAR

HEARING: Petition for Appointment of Conservator

COUNSEL:

CARLOS E AGUILAR (PET)...PRO/PER
ERVIN A AGUILAR (CEE)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, of the person and estate by Carlos Aguilar, [father/Petitioner].

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

1. Petitioner seeks Pr. C. § 2590 powers to sell real or personal property of the estate and proceeds, however, does not indicate reason. Court to clarify if petitioner is seeking these powers. JTD
2. Petitioner seeks to be appointed successor conservator; however, does not indicate additional information. Court to clarify if proposed conservatee is currently under conservatorship. JTD
3. Petitioner alleges that proposed conservatee is developmentally disabled. As this is not a petition for Limited Conservatorship, an IRC report is optional per Pr.C. §1827.5(b). Does court wish to require IRC Report? JTD
4. Petitioner requests no bond be required; however, does not indicate reason. As the only assets reported are public assistance benefits of \$6,840 and \$100 in personal property. No bond would be required Pr.C. §2323 and §2628. **JTD**
5. Petitioner does not request medical powers in item 1g, yet indicates medical treatment in item 9. **Need** verified supplement clarifying requested powers. **If medical powers sought, need Capacity Declaration.**
6. Confidential Supplemental Information is not dated at signature line or indicate printed name of person who signed form. **Need** complete form.
7. Petition does not list paternal and maternal grandparents. **Need** verified supplement as to their status.
8. **Need** List of Required Contacts (Local form SB-12224).
9. **Need** notice of hearing and proof of service.
10. **Need** Court Investigator Referral Report (Local form SB-360).

11. Proposed conservatee is developmentally disabled. **Need** appointment of counsel for report by same **Need** Court Investigator report.
12. **Certificate of Completion of the Conservatorship Training Class filed 04/05/18.**
13. Citation with proof of service filed 03/07/18.
14. No proposed Order/Letters: Submit after hearing. .

RECOMMENDATION

Need to clear notes 8-11. Court's discretion re bond. If approved, set hearing for Compliance Review for **11/19/18** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); 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 and Appraisal, and Proof of service of I & A Instructions for Objection per Pr.C. §2610; and recordation of letters, **if applicable, per Pr.C. § 2313.**

Set hearing re Accounting Review for **06/24/19**. Any accounting to be filed 30 days in advance.

(cs)

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

DATE: 04/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800059

CASE NAME: MTR OF VERNIA L HARRIS

HEARING: Petition for Appointment of Conservator

COUNSEL:

STEVEN E HARRIS (CP)...PRO/PER
VERNIA L HARRIS (CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, of the person only, by Steven Harris [son/Petitioner].

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

1. No Bond- Person only.
2. Petitioner seeks medical powers. Capacity Declaration filed 03/06/18; however, item 2 is missing office telephone number and item 5b not checked.
3. Petitioner seeks dementia powers. **Need** appointment of counsel for report.
4. Citation with proof of service filed 03/22/18; however, section 3(a) is incomplete and section 3(b) indicates date and city where mailed from. **Need** personal service of citation on proposed conservatee.
5. **Need** Certificate of Completion of the Conservatorship Training Class .
6. Notice of hearing and proof of service filed 03/22/18; however, section 3a/3b re method of mailing is incomplete. **Need** corrected proof of service.
7. **Court Investigator report of no report filed 04/04/18.**
8. Court to see Confidential Screening form.
9. ~Proposed Form Order: 03/06/18.

RECOMMENDATION

Need to clear notes 3-6, then **Court's discretion re note 7**. If approved, set hearing for Compliance Review for **11/19/18** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); 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.

(cs)

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

DATE: 04/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800066
CASE NAME: MTR OF ANDREW MICHAEL JIMENEZ
HEARING: Petition for Appointment of Conservator

VACATED

CASE REASSIGNED TO S36

COUNSEL:

ELIZABETH J JIMENEZ (CP)...PRO/PER
ANDREW MICHAEL JIMENEZ (CTP)...JAMES B CHURCH

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator, of the person only, by Elizabeth Jimenez, [mother/Petitioner].

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

1. Person only- no bond.
2. Petitioner seeks powers re habilitation, treatment, training, medical etc. JTD
3. 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
4. Petitioner seeks civil rights be limited without court order. JTD
5. Petitioner seeks medical powers. Capacity Declaration filed 03/22/18; however, item 2 is missing office telephone number.
6. **Need** Attachment 14 to Conservator Screening form.
7. **Need** Certificate of Completion of the Conservatorship Training Class.
8. Proposed conservatee is developmentally disabled. **Need** report of James Church, court appointed counsel.
9. Proposed conservatee is developmentally disabled. **Need** IRC report.
10. **Need** Court Investigator report.
11. Citation with proof of service filed 03/22/18.
12. Notice given.
13. ~Proposed Form Order: 03/09/18.

RECOMMENDATION

Need to clear notes 6-10. If approved, set hearing for Compliance Review for **11/19/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 29 add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

MISC.

DATE: 04/16/18 TIME: 1:30 DEPT: S37P

CASE#: CON PS1700169

CASE NAME: DEREK J. BARWICK

SEE ALSO 30

HEARING: Hearing Re: PETITION FOR APPOINTMENT OF CONSERVATOR

COUNSEL:

DENNIS BARWICK

(PET)... MATTHEW SHEASBY

DEREK JUSTIN BARWICK

(CEE)...CANDICE A GARCIA-RODRIGO

PAMELA L BARWICK

(PET)...HARTNELL LAW GROUP

GENERAL INFORMATION

Pamela Barwick appointed temporary conservator on 05/11/17.

Continued from **06/20/17**. Father requesting to be co-conservator. Father advised to file a petition or speak with Counsel and have an amended petition filed. Court does not require an IRC report and will allow Counsel to decide which type of conservatorship requested.

Continued from 08/08/17. Father's competing petition filed. Referred to Court Investigator. The Court requests IRC provide a supplemental report regarding father's request for conservatorship. The Court deems competing petitions to be objections to the other petition. The Court recommends parents use OurFamilyWizard to exchange information regarding proposed conservatee. Matter continued to trail competing petition.

Continued from 09/12/17 and 10/18/17. Mediation was unsuccessful.

Continued from 12/06/17 to clear probate notes. Court notes and accepts the report of appointed Counsel, Candice Garcia-Rodrigo, for petitioner 2 as the information need for petition 2 was included in the report filed 07/24/17 for petition 1.

Continued from **02/14/18**. Court cleared all notes on competing petition.

Continued from 03/29/18 at request of Court. Matter set for trial – estimated 2 days.

THIS CASE SET FOR HEARING ON

Petition - 1: Petition for Appointment of Conservator person and estate by **Pamela Barwick (mother)**

Petition - 2: Petition for Appointment of Conservator person and estate by **Dennis Barwick (father)**

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

Petitioner 1- Pamela Barwick; mother:

1. Petitioner requests no bond as proposed conservatee has no assets or income. Question need for estate powers.
2. Proposed conservatee is developmentally disabled. It appears a petition for Limited Conservatorship may be appropriate.
3. Report of appointed counsel Candice Garcia-Rodrigo, filed 07/24/17.
4. Court Investigator report filed 01/31/18.
5. IRC report filed 06/15/17 07/20/17.
6. Petitioner seeks medical powers. Capacity Declaration filed 05/05/17.
7. Certificate of Completion of the Conservatorship Training Class filed 06/01/17.
8. Return of Citation filed 05/25/17.
9. ~Proposed Form Order: 05/05/17
10. **Objection filed by Dennis Barwick on 07/31/17.**
11. **Court deems competing petition by father as Objection.**

Petitioner 2 -Dennis Barwick; father:

12. Petitioner requests no bond as proposed conservatee has no assets or income. Question need for estate powers? Court to inquire.
13. Proposed conservatee is developmentally disabled. Report of Counsel Garcia-Rodrigo filed 07/24/17
14. Petitioner requests medical powers. Capacity Declaration filed by Pamela. Court cleared on record.
15. CI Report of No Report filed 09/12/17. Special CI Report filed 01/31/18.
16. Proof of Completion re Conservatorship Class filed 02/01/18.
17. IRC Report filed 08/31/17.
18. ~Proposed Form Order/Letters 08/07/17.
19. **Court deems competing petition by mother as Objection.**

RECOMMENDATION:

Matter is contested. If approved, set hearing for Compliance Review for **11/29/18** for the filing of the required documents and hearing re Accounting Review for **06/27/19**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

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

Superior Court of Calif, County of San Bernardino
Page: 30 add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY TRIAL

DATE: 04/16/18 TIME: 1:30 DEPT: S37P

CASE#: CON PS1700169

CASE NAME: DEREK J. BARWICK

SEE ALSO 29

Court Trial set for PETITION FOR CONSERVATORSHIP of PAMELA L BARWICK

COUNSEL:

DENNIS BARWICK	(PET)... MATTHEW SHEASBY
DEREK JUSTIN BARWICK	(CEE)...CANDICE A GARCIA-RODRIGO
PAMELA L BARWICK	(PET)...HARTNELL LAW GROUP

No notes – Trial. JTD