



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 04/17/18

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.

nb0329/0411

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PROBATE

DATE: 04/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1300023

CASE NAME: DOLORES BUJANDA

HEARING:

Accounting Review by ***

COUNSEL:

ALBERT BUJANDA

(PET)...KARIN E HORSPPOOL

DEPARTMENT OF HEALTH CARE SERV (TP)...PRO/PER

DOLORES BUJANDA

(DEC)...

PETRA MCCONNELL

(PET)...KARIN E HORSPPOOL

GENERAL INFORMATION:

Continued from 02/20/18 to file accounting by 03/17/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Special Administration issued 01/28/13, no bond. Letters Testamentary issued 02/26/13 to Albert Bujanda and Petra McConnell, full authority, no bond.
2. Status Report Order entered 12/13/16; account now due.
3. No accounting or updated status report. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 2

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500442

CASE NAME: CORRINE ELLEN HANSON

HEARING:

Accounting Review by ***

COUNSEL:

CORRINE ELLEN HANSON

(DEC)...

RUTH L HENRICKS

(PET)...HARTNELL LAW GROUP

GENERAL INFORMATION:

Continued from 11/28/17 at request of counsel. Court sets deadline for the filing of the accounting- if filed by 4pm November 29, 2017, the clerk's office is ordered to set the accounting for January 9, 2018. If the accounting is filed after the deadline, the accounting is to be set on the court's next available at the clerk's office.

Continued from 01/09/18 and 03/06/18 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order on Report of Status of Administration entered 11/22/16.
2. No accounting or updated status report. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 04/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501020

CASE NAME: RYAN WALLIS

HEARING:

Accounting Review by ***

COUNSEL:

MICHAEL SCHAEFER (PET)...DIANE E ROBBINS
RYAN WALLIS (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review by Executor, Michael Schaeffer.

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

1. Order on Report of Status entered 04/18/17; account now due.
2. No accounting or updated status report. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 4

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501072

CASE NAME: WERNER LEE WEINMEISTER

HEARING:

First and Final Account and Report of REAGENE YOUNG and Petition
for allowance of fees filed.

COUNSEL:

DAVID WEINMEISTER	(PET)...	SUSAN E. CLARK
REAGENE YOUNG	(PET)...	IGNAZIO FICARA
WERNER LEE WEINMEISTER	(DEC)...	

GENERAL INFORMATION:

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

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

1. Accounting period 10/14/15 to 01/31/18.
2. Assets on Hand \$204,269.57 consisting of \$174,767.97 in cash and remaining
in personal property.
3. Petitioner waives statutory compensation.
4. Attorney requests statutory fees of \$7,172.17. Calculated. Question if fees will
be apportioned with counsel, Attorney Horspool? Need verified supplement.
5. Petition indicates a settlement agreement was reached on 06/30/17 as to
distribution of decedent's estate. Does Court wish to ratify subject Mutual
Release and Settlement Agreement [LF, pgs. 22-26]? JTD.
6. Need bank/financial statements to support date of death balances and closing
balance for Bank of America, Checking Acct. No. XXX1133 via verified
supplement.
7. Proposed Form Order 02/07/18 needs to be approved as to form and content by
Attorney Clark.

RECOMMENDATION:

Need to clear notes 4 & 6 then Court's discretion. If approved, set next hearing for
receipts and final discharge for **04/23/19**.

(nb)

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

Superior Court of Calif, County of San Bernardino

Page: 5

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601072

CASE NAME: POPPY ANN WALKER SEPARATE PROPERTY TRUST

SEE ALSO 6, 14

HEARING:

Hearing Re: TRIAL SETTING CONFERENCE/ISSUES OF DMGS/SURCHARGE

COUNSEL:

JAY JAY HENDERSON

(OBJ)...THE GROSSMANLAW FIRM,

JAY JAY HENDERSON

(PET)...THE GROSSMAN LAW FIRM

MICHAEL WALKER

(PET)...GAUDY LAW, INC

POPPY ANN WALKER TRUST DATED

(TRU)...

No notes – TSC.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 6

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601072

CASE NAME: POPPY ANN WALKER SEPARATE PROPERTY TRUST

SEE ALSO 5, 14

HEARING:

FIRST AND FINAL Account and Report of MICHAEL WALKER and
Petition for allowance of fees filed.

COUNSEL:

JAY JAY HENDERSON	(OBJ)...THE GROSSMANLAW FIRM,
JAY JAY HENDERSON	(PET)...THE GROSSMAN LAW FIRM
MICHAEL WALKER	(PET)...GAUDY LAW, INC
POPPY ANN WALKER TRUST DATED	(TRU)...

GENERAL INFORMATION:

Continued from **10/24/17**. Counsel for Michael Walker to file by 4pm January 9, 2018, supplements to clear the probate notes.

Continued from 02/13/18. Counsel represents a 473B Motion has been previously filed and is currently set on April 17, 2018. The Court continues this matter to be heard concurrently with the Motion set on April 17, 2018. Notice waived.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Successor Trustee, Michael Walker ["Petitioner"] aka Michael Ray Walker, Sr.

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

1. Accounting period 02/22/16 to 12/27/16.
2. Assets on Hand \$0.00. Prior assets on hand in the amount of \$278,498.76 distributed to petitioner per fourth amendment to the trust [LF, p. 40]
3. Petitioner requests ratification for reimbursement of costs advanced of \$22,507.20. Itemized [LF, p.62].
4. Compensation or fees are not requested.
5. No proposed order. Submit Order after Hearing.
6. **Objections filed 09/22/17 by Jay Jay Henderson.**

RECOMMENDATION:

Set for contested hearing.

(nb)

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

Superior Court of Calif, County of San Bernardino

Page: 7

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601211

CASE NAME: DONNA LEE JEWITT

HEARING:

First & Final Account and Report of NOAH B BENTON and Petition
for allowance of fees filed.

COUNSEL:

DONNA LEE JEWITT

(DEC)...

NOAH B BENTON

(PET)...KYLE A PATRICK

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees
by Administrator w/Will Annexed, Noah B. Benton ["Petitioner"-PPF-Successor
Trustee].

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

1. Accounting period 11/15/15 to 12/31/17.
2. Assets on Hand \$303,436.84 consisting of \$45,272.51 in cash and remaining in mutual funds.
3. Statutory fees of \$11,478.18 requested. Calculated.
4. Attorney requests extraordinary fees of \$5,132.50 for services rendered in connection with a petition for preliminary distribution and an ex parte application to advance this hearing. **Need** itemization per CRC 7.702 indicating the specific amount requested for each category of service via verified supplement.
5. **Need** bank/financial statements to support closing balances via verified supplement.
6. Petitioner requests authority to withhold the sum of \$1,500 as a reserve. JTD.
7. ~Proposed Order 02/07/18.

RECOMMENDATION:

Need to clear notes 4-5 then Court's discretion. If approved, set next hearing for receipts and final discharge for **04/23/19**.

(nb)

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

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 04/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700621

CASE NAME: HYL A MARROW

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS TESTAMENTARY W/FULL
IAEA

COUNSEL:

HR TOPALIAN (PET)...JILL BROUSARD
HYLA MARROW (DEC)...

GENERAL INFORMATION

Continued from 09/19/17, 12/05/17, 01/09/18 and 03/06/18 at request of counsel.

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by H.R. Topalian, Executor

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

1. Will waives bond. Estate value consists of \$160,000 in personal property.
2. Duties and liabilities filed, however, the telephone number for the proposed personal representative is missing. **Need** same.
3. The will conditionally incorporates decedent's Trust. Copy of trust received.
4. Proof of publication filed.
5. Notice filed 03/12/18 is incorrect. Need Notice of Petition to Administer Estate with proof of service that includes beneficiaries of trust. **Need** proper notice.
6. Proposed order not submitted.

RECOMMENDATION

Need proper notice then 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/nb)

Superior Court of Calif, County of San Bernardino

Page: 9

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

DATE: 04/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1701111

CASE NAME: Matter of In Soo Lim

HEARING:

Petition to determine succession to Real Property

	COUNSEL:
HEE JIN LIM	(PET)...PRO/PER
IN SOO LIM	(DEC)...

GENERAL INFORMATION:

Continued from 02/27/18. Court permits petitioner to appear via court call for next hearing.

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by daughter, Hee Jin Lim ["Petitioner"].

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

1. Petitioner requests a determination that decedent's real property located in San Bernardino County pass to petitioner without administration. **Supp. (2/23/18) indicates decedent was survived by a spouse, minor issue and mother who reside in Korea. Need** amended petition joined in by all those who will succeed to the real property by intestate succession.
2. **Need** Notice of Hearing with proof of service to include diplomatic or consular office of Korea per Pr.C. 8113
3. ~Proposed Form Order 11/06/17.

RECOMMENDATION:

Need to clear notes 1-2 then Court's Discretion.

(nb)

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

Superior Court of Calif, County of San Bernardino

Page: 10

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800032

CASE NAME: Carol Jean Brinks

HEARING:

Petition to determine succession to Real Property

COUNSEL:

CAROL JEAN BRINKS (DEC)...

DWAYNE BRINKS (PET)...LINDA ROBERTS ROSS

GENERAL INFORMATION:

Continued from 02/27/18. Counsel states she will file an amended petition.

THIS CASE IS SET FOR HEARING ON **Amended** (03/15/18) Petition to Determine Succession to Real Property (Estates \$150,000 or less) by brother, Dwayne Brinks ["Petitioner"].

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

1. Petitioner requests a determination that decedent's one-half interest in real property located at San Bernardino County pass to petitioner without administration. Petitioner states he is decedent's sibling and tenant-in-common with Decedent.
2. ~Proposed Form Order 01/22/18.

RECOMMENDATION:

Court's Discretion.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 11

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800072

CASE NAME: Adelina Salazar

SEE ALSO 12

HEARING:

Hearing Re: OSC RE DISMISSAL OF PETITION TO DETERMINE, ETC

COUNSEL:

ADELINA SALAZAR

(DEC)...

JORGE O SALAZAR

(PET)...GABRIELLE R RANSELL

GENERAL INFORMATION:

Continued from 02/27/18 due to non-appearance. Court notes that if petitioner does not appear at next hearing, or have all probate notes cleared, court will dismiss petition at next hearing date.

THIS CASE IS SET FOR HEARING ON **OSC re Dismissal** on Petition to Determine Succession to Real Property (Estates \$150,000 or less) by son, Jorge O. Salazar ["Petitioner"].

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

1. Inventory & Appraisal attached to petition has the following issues:
 - a. No signatures on the I&A by petitioner. Need signature of verification.
 - b. Section 5 is incomplete,
 - c. Statement about the Bond section is incomplete.
 - d. Not dated or signed by counsel at bottom of page.
 - e. Attachment 2 does not include decedent's interest in estate.
 - f. Attachment 2 does not include character of property.
Need corrected inventory
2. Petitioner requests a determination that decedent's 50% interest in real property located in San Bernardino County pass to petitioner without administration. Petitioner is decedent's issue and purported sole heir per intestate succession.
3. ~Proposed Form Order 01/19/18.

RECOMMENDATION:

Need corrected I&A then Court's Discretion.

(nb)

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

Superior Court of Calif, County of San Bernardino

Page: 12

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800072

CASE NAME: Adelina Salazar

SEE ALSO 11

HEARING:

Petition to determine succession to Real Property

COUNSEL:

ADELINA SALAZAR

(DEC)...

JORGE O SALAZAR

(PET)...GABRIELLE R RANSELL

See prior matter #11.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 13

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

DATE: 04/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800203

CASE NAME: MTR OF DOROTHY KRESTY

HEARING:

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

COUNSEL:

DOROTHY KRESTY (DEC)...
STEVEN J KRESTY (PET)...MARGERIE E YOU DATH

GENERAL INFORMATION:

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

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

1. Heirs waive bond. Estimated estate valued at \$500,000. The Court may for
good cause require that a bond be given, either before or after issuance of
letters. Pr. C. § 8481(b). JTD.
2. Section 5 (7) or (8) to petition is incomplete as to whether there is issue of a
predeceased child. Need verified supplement.
3. ~Proposed Form Order/Letters 02/23/18.

RECOMMENDATION:

Need to clear note 2 then Court's discretion re: bond. If approved, set future hearing
for Accounting/Status Review on **06/25/19**. Any account to be filed 30 days in advance
of hearing. Note requirements of Local Rules.
(nb)

Superior Court of Calif, County of San Bernardino

Page: 14

CIVPRO

San Bernardino District

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

DATE: 04/17/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1601072

CASE NAME: POPPY ANN WALKER SEPARATE PROPERTY TRUST

SEE ALSO 5, 6

HEARING:

Motion Re: Set Aside Default and Default Judgment Filed by
Defendant MICHAEL WALKER

COUNSEL:

JAY JAY HENDERSON

(OBJ)...THE GROSSMANLAW FIRM,

JAY JAY HENDERSON

(PET)...THE GROSSMAN LAW FIRM

MICHAEL WALKER

(PET)...GAUDY LAW, INC

POPPY ANN WALKER TRUST DATED

(TRU)...

Currently under review by Legal Research.
(LR)

Superior Court of Calif, County of San Bernardino

Page: 15

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/17/18 TIME: 8:35 DEPT: S35P

CASE#: TRU PS1800051

CASE NAME: FRANCYNE REED REVOCABLE TRUST

HEARING:

Petition for an order to confirm validity of trust; confirm trustee;& confirm assets to Trust

COUNSEL:

FRANCYNE REED REVOCABLE TRUST (TRU)...

JUDITH DAVIDS

(PET)...JAMES R STOUT

Currently under review by Legal Research.
(LR)

Notice:

Need Notice of Hearing with proof of service to beneficiary, Molly Vanpulliam.
(nb)

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

Superior Court of Calif, County of San Bernardino

Page: 16

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/17/18 TIME: 8:35 DEPT: S35P

CASE#: TRU PS1800053

CASE NAME: THE TRUST OF JOHN W HARTMAN

HEARING:

Petition for Successor Trustee For Order Determining Title To
Property Within Trust etc

COUNSEL:

DIRK W HARTMAN

THE TRUST OF JOHN W HARTMAN

(PET)...GUAY P WILSON

TRU)...PRO/PER

Currently under review by Legal Research.
(LR)

Notice:

Need Notice of Hearing with proof of service to issues, Lucinda Van Grouw, Jule Anne
Rice and Desiree' Hartman.
(nb)

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

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

DATE: 04/17/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS0800031

CASE NAME: JOSE JUAN PADRON RODRIGUEZ

HEARING:

Eighth Account and Report of GREG OVEROSS and Petition for allowance of fees filed.

COUNSEL:

EVELYN JENNIFER PADRON	(CP)...J. DAVID HORSPOOL
EVELYN JENNIFER PADRON	(CPE)...J. DAVID HORSPOOL
EVELYN PADRON	(CP)...HORSPOOL & HORSPOOL
GREG OVEROSS	(PET)...HANRAHAN LAW FIRM
GREG OVEROSS	(SC)...PATRICK L. HANRAHAN
JOSE JUAN PADRON RODRIGUEZ	(CEP)...MITCHELL I ROTH
JOSE JUAN PADRON RODRIGUEZ	(PET)...CHO, SHEASBY, CHUNG &
LOURDES BARRAGAN	(RES)...LENITA A SKORETZ
MATTHEW E SHEASBY	(PET)...CHO, SHEASBY, CHUNG &
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
S.N. TRUST OF JOSE JUAN PADRON	(TRU)...

LF image(s) not available. Clerks' Office notified.
(nb)

Superior Court of Calif, County of San Bernardino

Page: 18

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

DATE: 04/17/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600261

CASE NAME: GLORIA MOORE

HEARING:

Accounting Review by ***

COUNSEL:

CLIFFORD MOORE	(PET)...CHRISTINA FERRANTE
GLORIA MOORE	(CEE)...
JOHN MARANAN	(PET)...CHRISTINA FERRANTE
SANDY TURNER	(PET)...SANDRA TURNER
SURETEC INSURANCE COMPANY	()...

GENERAL INFORMATION:

Conservatee passed away on 11/07/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. John Maranan and Clifford Moore appointed conservators of the person and estate on 02/07/17.
2. Need separate pre and post death accounting per Pr. C. §2620.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 19

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

DATE: 04/17/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700071

CASE NAME: JOSE LUIS GONZALEZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of GRACIELA GONZALEZ

COUNSEL:

GRACIELA GONZALEZ (CP)...PRO/PER
JOSE LUIS GONZALEZ (CTP)...WALTER T. MOORE

GENERAL INFORMATION

Graciela Gonzalez appointed Conservator of the person on 09/12/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

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

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 20

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/17/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700293

CASE NAME: MTR OF PATRICK MICHAEL O'BRIEN

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ANGELA TAFOYA

COUNSEL:

ANGELA TAFOYA	(CP)...PRO/PER
EDWARD TOFOYA	(CP)...PRO/PER
PATRICK MICHAEL O'BRIEN	(CTP)...PRO/PER

GENERAL INFORMATION

Angela and Edward Tofoya appointed Conservators of the person on 09/12/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

- 1 Notification of Conservatee's Rights filed. However, section 5 to proof of mailing is incomplete. Question of a conformed copy of the Order Appointing Probate Conservator was also mailed? Court to inquire.
- 2 Care Plan and a Determination of Conservatee's Appropriate Level of Care filed.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 21

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

DATE: 04/17/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800052

CASE NAME: ROBERT JAMES BRADY

HEARING:
Petition for Appointment of Conservator

COUNSEL:
MARY ELLEN ELDREDGE (PET)...CHRISTINA FERRANTE
ROBERT JAMES BRADY (CEE)...

X-REF: CON-PS1800049 (Walter Fred Brady Jr.) in S37
GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Limited Conservatorship of the person by sister, Mary E. Eldredge ["Petitioner"].

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. **Need** appointment of counsel and report by same.
3. Medical Capacity Declaration is not dated at page one. However, is dated at page 3. Judge to determine if sufficient.
4. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
5. Citation returned SERVED.
6. **Court Investigator Report filed.**
7. **Need** Inland Regional Center Report.
8. **Need** Certificate of Completion re Conservatorship Class.
9. ~Proposed Form Order/Letters 02/27/18.

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

RECOMMENDATION:

Court to appoint counsel then need to clear notes. If approved, set hearing for Compliance Review for **11/20/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 22

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/17/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800061

CASE NAME: MTR OF VALADETTE CHERI JOHNSON

HEARING:

Petition for Appointment of Conservator

COUNSEL:

STEVEN D JOHNSON (CP)...JEFFREY A GOTTLIEB

VALADETTE CHERI JOHNSON (CTP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by brother, Steven D. Johnson.

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. **Need** report by court-appointed counsel, Bryan Hartnell.
3. **Need** Medical Capacity Declaration.
4. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
5. Petitioner requests to limit civil and legal rights of proposed conservatee to consent or withhold consent to marriage of, or entrance into a registered domestic partnership by limited conservatorship; to exercise limited conservatee's right to control his or her social and sexual contacts and relationships.
6. Proof of Service to Citation returned on 04/06/18 is incomplete at Section 3a as to date and time. **Need** proper service.
7. **Court Investigator Report filed.**
8. **Need** Inland Regional Center Report.

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

9. **Need** Certificate of Completion re Conservatorship Class.
10. ~Proposed Form Order 03/01/18.

RECOMMENDATION:

Need to clear notes. If approved, set hearing for Compliance Review for **11/20/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 23

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/17/18 TIME: 9:30 DEPT: S35P

CASE#: SC SS01183

CASE NAME: IN THE MATTER OF JOSHUA J ROBINSON

HEARING:

TENTH Account and Report of LUCILLE WILKES-GARVIN and Petition for allowance of fees filed.

COUNSEL:

JOSHUA J ROBINSON	(CEP)...MARK J. ANDREW FLORY
JOSHUA ROBINSON	(CEP)...
LUCILLE WILKES	(CPE)...CRAIG M PARKER
LUCILLE WILKES	(PET)...CRAIG M PARKER
LUCILLE WILKES-GARVIN	(CPE)...CRAIG M PARKER

GENERAL INFORMATION

Continued from 12/12/17 on Court's motion. Court orders supplemental accounting to be filed by 3/13/18.

THIS CASE IS SET FOR HEARING ON Tenth Account Current and Petition for Fees by Conservator of the Person and Estate, Lucille Wiles-Garvin ["Petitioner"].

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

1. Accounting period 01/01/15 – 12/31/16 (2 years).
2. Assets on hand \$577,924.29 consisting of \$76,805.84 in cash; \$410,000 in real property and remaining in personal property.
3. Current bond of \$408,000. Insufficient. Suggest bond increase by \$65,000 for a total new bond of \$473,000. JTD.
4. Conservator requests compensation of \$9,915.55. Billed at \$45-\$75/hour for 206.70 hours. Itemized [LF, pgs. 41-46]. JTD.
5. Petitioner's husband, Shawn Garvin, Sr. also assisted Conservator in providing services to Conservatee. Petitioner also requests her husband's time in the care of conservatee be compensated at \$6,390.00. Billed at \$45/hour for 142 hour's. Itemized [LF, pgs. 47]. JTD.
6. Attorney requests compensation of \$5,337.50. Billed at \$350/hour for 15.25 hours attorney time. Itemized [LF, pgs. 49-50]. JTD.
7. Last CI report filed 10/21/15. Need updated CI Report.

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

8. Proposed Order 10/24/17 alleges current bond in the amount of \$408,000 is sufficient.

RECOMMENDATION:

Need CI Report then Court's discretion re: bond. If approved, set hearing on the next accounting review in **60 days** (if one year) or **02/26/19** (if two years). Account to be filed 30 days in advance of hearing.

(nb)

Superior Court of Calif, County of San Bernardino
Page: 24
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT **PA**

DATE: 04/17/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1500010

CASE NAME: Dorothy G Chambers

HEARING:
Probate status report filed.

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

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report (filed 02/13/180 by Successor Administrator, Public Administrator) ["Petitioner"].

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

1. Petitioner alleges the estate is not in a condition to be closed as Petitioner had filed with the State of California, Unclaimed Property Division, to recover the Insurance Proceeds which were deposited with the State.
2. Petitioner requests 12 months for the estate to remain open.
3. ~Proposed Form Order 02/13/18.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review for **04/23/19**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.
(nb)

Superior Court of Calif, County of San Bernardino

Page: 25

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

MISC

DATE: 04/17/18 TIME: 1:30 DEPT: S35P

CASE#: CON PS1500161

CASE NAME: MTR OF ELVIRA ALBURJAS

HEARING:

Hearing Re: COURT TRIAL (SECOND DAY)

COUNSEL:

BEATRIZ TRAVERSO

(OBJ)...DAVID P COLELLA

BEATRIZ TRAVERSO

(PET)...PRO/PER

ELVIRA ALBURJAS

(CEP)...MATTHEW E SHEASBY

MARIA YOLANDA DENNY

(CPE)...JAMES A HAGAN

ROBERT DENNY

(CPE)...JAMES A HAGAN

No notes – Court Trial.
(nb)

Future Hearing:

04/18/18 Court Trial

04/19/18 Court Trial

04/20/18 Court Trial

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

PROBATE

DATE: 04/17/18 TIME: 8:30 DEPT: S36P

CASE#: PRO DS1000735

CASE NAME: MTR OF NATASHA MANSKER

HEARING:

Accounting Review by ***

COUNSEL:

CAROL GROSSO

(PET)...JACK H ANTHONY

NATASHA MANSKER

(DEC)...

GENERAL INFORMATION:

Continued from 03/13/18 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review by Carol Grosso, Trustee of the Natasha Mansker SNT.

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

1. Order Settling Third Account entered 04/19/16; fourth account now due.
2. No accounting or status report. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 04/17/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600524

CASE NAME: MTR OF JUAN-EDGAR RAPACON GAPUZAN

HEARING:

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

COUNSEL:

JUAN-EDGAR RAPACON GAPUZAN (DEC)...
ROCHELLE EVANGELISTA DEL ROSAR (PET)...JOSEPH FLOHR

LF image(s) not available. Clerks' Office notified.
(nb)

Superior Court of Calif, County of San Bernardino

Page: 3

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 04/17/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600995

CASE NAME: MTR OF TAMARA KAY HANSON

HEARING:

Accounting Review by ***

COUNSEL:

CRAIG A HANSON

(PET)...BUXBAUM & CHAKMAK

TAMARA KAY HANSON

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Craig A. Hanson appointed on 02/07/17, full authority, \$100,000 bond. Letters of Administration issued 02/08/17.
2. No accounting or status report. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 04/17/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700676

CASE NAME: MTR OF PAUL JAMES LENHART

HEARING:

Waiver of Account and Report of JODIENNA ANN LUKACS and Petition for allowance of fees filed.

COUNSEL:

CA FRANCHISE TAX BOARD (TP)...
JODIENEE ANN LUKACS (PET)...MICHAEL C MADDUX
PAUL JAMES LENHART (DEC)...

GENERAL INFORMATION:

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

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

1. Final Inventory and Appraisal filed 09/18/17 does not include decedent's Wells Fargo Checking Account in the amount of \$4,366.10 as mentioned in petition [LF, p. 4]. **Need** proper inventory **with** supporting bank statement to support date of death balance.
2. Petition indicates there is an heir, Damon Moore, who is in prison [LF, p. 8], but does not specify relationship to Decedent. However, both petitions, Sections 8 did not include purported heir Damon Moore; who was never given notice; and is not included in the proposed distribution. **Need** proper service and amended accounting.
3. Heirs waive accounting. However, **need** waivers of account by Jodienee and purported heir, Damon Moore.
4. Assets on Hand \$149,366.10 consisting of \$4,366.10 in cash and remaining in real property.
5. Statutory fees of \$5,350.00 requested. Calculated.
6. Attorney requests extraordinary fees of \$4,950.00 for services rendered in connection with the stay of foreclosure. Billed at \$325/hour for a total of 14 hours' attorney time. Itemized [LF, p. 6]. **JTD**.
7. Petitioner requests that Court that a judgment in the total amount of \$10,300 be entered against the Estate and against each heir for \$3,417.60 each; Beth

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.**

- Atmold, Leta Lenhart and Codi Lenhart, jointly and severally, to secure attorney's fees, since the heirs intend to retain the estate property. However, request does not include purported heir, Damon Moore. **Need** same.
8. Petitioner requests the title to the real property located at 12262 Beaver Avenue, Victorville, CA 92392, be vested in above-named heirs as Tenants in Common at 33.33%, each. However, proposed distribution does not include Damon Moore. **Need** same.
 9. Omnibus clause does not include purported heir, Damon Moore. **Need** same.
 10. The judgment amount reflected in the prayer [LF, p. 11] does not match the amount requested. **Need** verified supplement.
 11. Petitioner request remaining cash assets at Citibank Acct. No. XXX6134 be paid to her as partial statutory fees. **JTD**.
 12. Petition indicates there are only 2 creditors' claims. However, there are at least 5 creditor's claims. **Need** verified supplement.
 13. Petitioner requests authorization and direction to pay the claim of FTB in the amount of \$2,289.67. **JTD**.
 14. Notice does not include purported heir, Damon Moore or all creditors. **Need** proper service.
 15. Proposed Order 03/07/18 includes deficiencies as noted above.

RECOMMENDATION

Need amended account to be set on first check calendar no sooner than **06/19/18**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules. (nb)

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 04/17/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800086

CASE NAME: Helen Goritz

HEARING:

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

COUNSEL:

HELEN GORITZ (DEC)...
SPIRO GORITZ (PET)...PRO/PER

GENERAL INFORMATION:

Continued from 03/06/18 to clear notes. Court suggests that petitioner seek legal assistance, as the petition has significant amounts of omissions.

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by son, Spiro Goritz ["Petitioner"].

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

1. Court address at caption is incorrect.
2. Section 3d to petition re character and estimated value of the property lists home at section 1-personal property and does not include total at section 3d(7).
3. Section 3e(1) to petition indicates will waives bond. However, will does not address bond.
4. Section 3f(3) to petition indicates the original will is lost. However, a receipt for lodging of the original will is filed.
5. Section 5b to petition is blank.
6. Section 7 to petition is marked and should be blank as issue survived decedent.
7. Will is not self-proving. Need Proof of Subscribing Witness.
8. Beneficiaries waive bond on estimated estate valued at \$200,000. However, Need Mandatory Waivers of Bond by Heir, form DE-142/DE-111, Spiro Goritz.
9. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
10. Need proof of publication.
11. Need Notice of Petition to Administer Estate with proof of service.
12. ~Proposed Form Order/Letters 01/29/18

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

RECOMMENDATION:

Need amended petition to be set on first check calendar no sooner than **06/12/18**.
If approved, set future hearing for Accounting/Status Review on **06/25/19**. Any
account to be filed 30 days in advance of hearing. Note requirements of Local Rules.
(nb)

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

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 04/17/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800184

CASE NAME: JOHN CRAIG FEDAK

HEARING:

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

COUNSEL:

JOHN CRAIG FEDAK (DEC)...
MARY WETTISH (PET)...JASON L GAUDY

GENERAL INFORMATION:

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

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

1. Heirs waive bond. Estimated estate valued at \$389,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
2. Publication filed. However, the Ontario News Press is not on San Bernardino's Newspapers of General Circulation List. Need proper publication.
3. ~Proposed Form Order/Letters 02/26/18.

RECOMMENDATION:

Need to clear note 2 then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **06/25/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 7

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 04/17/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800225

CASE NAME: MTR OF FRANK FRANCIS PERRICELLI

HEARING:

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

COUNSEL:

FRANK FRANCIS PERRICELLI (DEC)...
WILLIAM G MITCHELL (PET)...TREVOR

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by nephew, William G. Mitchell ["Petitioner"].

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

1. Will waives bond. Estimated estate valued at \$520,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). JTD.
2. ~Proposed Form Order/Letters 03/08/18.

RECOMMENDATION:

RFA subject to Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **06/25/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

DATE: 04/17/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1400006

CASE NAME: Velma Preciado

HEARING:

Second Current Account and Report of DENIS DICKINSON and
Petition for allowance of fees filed.

COUNSEL:

DENIS DICKINSON	(CPE)...CRAIG M PARKER
PUBLIC GUARDIAN	(PET)...COUNTY COUNSEL
ROD PACHECO	(OBJ)...PRO/PER
RODRIC ANTHONY PACHECO	(PCR)...PRO/PER
VELMA PRECIADO	(CEP)...PRO/PER
VELMA PRECIADO	(PCE)...BRYAN C HARTNELL

Waiver of Court Fees and Costs filed by VELMA PRECIADO is GRANTED
TOTAL FEES WAIVED TO DATE: \$465.00

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Second Account Current and Petition for Fees
by Successor Conservator of the Person and Estate, Denis Dickinson ["Petitioner"].

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

1. Accounting period 12/01/16 to 12/31/17.
2. Assets on hand \$19,965.81 consisting of \$15,596.08 in cash and remaining in non-cash assets. After payment of facility payments for the next couple months (at \$4,000/month) plus fees, the Conservatee will run out of money.
3. Petitioner requests the blocked money market account a Pacific Premier Bank be ordered closed and the balance, including interest, be deposited into the Conservatorship Checking Account XXX8469 at Pacific Premier Bank in Redlands, CA. **JTD.**
4. Current bond of \$24,000. Petitioner requests bond be exonerated. **JTD.**
5. Petitioner waives compensation.
6. Attorney requests fees of \$5,652.50. Billed at \$350/hour for 16.15 hours' attorney time. Itemized [LF, p. 21]. **JTD.**

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

7. Attorney requests reimbursement of costs advanced of \$51.00. Itemized [LF, p. 21].
8. Proposed Order 03/06/18 does not include account period.

RECOMMENDATION:

Court's discretion. If approved, set hearing on the next accounting review for **01/29/19** (if one year) or **01/28/20** (if two years). Account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Future Hearing:

04/30/18 Final Discharge

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

DATE: 04/17/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800055

CASE NAME: ALLEN FONG

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ALLEN FONG (CEE)...
MANITH KUOY (PET)...PRO/PER

GENERAL INFORMATION:

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

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. **Need** report by court-appointed counsel, Craig Parker.
3. Medical Capacity Declaration Sections 1, 2 & 8 are incomplete. **Need** complete capacity declaration.
4. Conservator Screening Form, Sections 2a & 2b, 7-20 are incomplete. **Need** complete Screening Form.
5. CII Form is incomplete. **Need** complete CII Form.
6. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
7. Proposed limited conservatee's civil and legal rights are not to be limited without a court order.
8. Citation returned SERVED.
9. Court Investigator Report filed.
10. **Need** Inland Regional Center Report.

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

11. Certificate of Completion re Conservatorship Class filed.
12. ~Proposed Form Order/Letters 02/28/18.

RECOMMENDATION:

Need to clear notes 2-5 & 10. If approved, set hearing for Compliance Review for **11/20/18** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 04/17/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500390

CASE NAME: JEREMY LEE OLSON

HEARING:

Accounting Review by ***

COUNSEL:

JEREMY LEE OLSON

(DEC)...

THOMAS EDWIN SHINTON

(PET)...PRO/PER

GENERAL INFORMATION

Continued from 04/27/17 and 06/29/17. No appearances, Thomas Shinton ordered to appear. Should he fail to appear the Court may suspend letters of administration.

Continued from **09/07/17**. Administrator will file a petition to terminate.

Continued from 11/09/17. No appearance. The Court will suspend letters of administration if Thomas Shinton is not present at next hearing and appoint the Public Administration should Thomas Shinton not appear/file accounting or petition to terminate. PA to be present at next hearing. Thomas Shinton is cited to appear at next hearing, should he fail to appear a bench warrant may be issued for his arrest.

Continued from 02/06/18. Petition to terminate will be filed. This is a no asset estate. The Court does not appoint Public Administrator at this time.

THIS CASE SET FOR HEARING ON Accounting review/Status

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

1. Letters of Administration issued to Thomas Shinton, brother, on 02/18/16; limited authority, no bond.
2. **Need** final Inventory and Appraisal
3. **Need** accounting/status report/petition to terminate.
4. Court may wish to notify Public Administrator.
5. Proof of service as to citation filed.

RECOMMENDATION

Need to clear notes 2 & 3. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. § 11050 et seq. (lc/ww/lc/nb)

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

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 04/17/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600118

CASE NAME: MTR OF TOMAS P VILLARREAL

HEARING:

Petition for Full Authority to Administer Estate

COUNSEL:

CECILIA VILLARREAL	(FULLERTON LEMANN SCHAEFER &
GABRIELA VILLAREAL	(GERARD V KASSABIAN
HUMBERTO VILLARREAL	(TP)...FULLERTON LEMANN SCHAEFER &
RENE VILLARREAL	(PET)...JASON L GAUDY
SURETEC INSURANCE CO	()...
TOMAS P VILLARREAL	(DEC)...

GENERAL INFORMATION:

At Ex Parte Hearing held on **12/28/17**, the Court did not grant request without an appraisal as this **is not** an arm's length transaction.

Letters of Administration issued to Rene Villarreal, son, on 06/16/16; limited authority, \$198,000 bond. Full authority later sought; however, hearing was taken off calendar on 01/10/18 as matter was no longer urgent.

Continued from 02/20/18 on Court's motion. Duties and Liabilities of personal representative form filed in the courtroom. Gabriela Villarreal may file objections prior to next hearing.

THIS CASE IS SET FOR HEARING ON **AMENDED** (02/02/18) Petition for Letters of Administration **with full authority under IAEA** by Administrator with Limited Authority, Rene Villarreal ["Petitioner"-son].

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

1. Petitioner seeks full IAEA powers to Approve Agreement for Purchase of Sale of Stock and Real Property; to Post Additional Bond; with proposed agreement and waivers of notices.
2. Petitioner requests bond in the amount of \$1,300,000.00 be fixed. Appears sufficient. JTD.
3. Appraisal Report affixed to supplement filed on 01/05/18.
4. Declaration by Attorney Schaefer in support of petition filed.
5. Consents and Waiver of Notice filed.

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

6. Notices do not include Humberto Villarreal or Fullerton, Lemann, Schaefer & Dominick, LLP. **Need** proper service.

RECOMMENDATION:

Need to clear note 6 then Court's discretion re bond. If approved, set next hearing for Accounting Review on **04/30/19**.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 04/17/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600459

CASE NAME: JOHN J SCHMELZER

HEARING:

Accounting Review by ***

COUNSEL:

CAROLYN M SCHAFER (PET)...PRO/PER
JOHN J SCHMELZER (DEC)...

GENERAL INFORMATION:

Continued from 02/06/18. No appearance. Carolyn Schafer is ordered to be present at next hearing if accounting is not filed. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters Testamentary issued 11/29/16 to daughter, Carolyn Schafer, full authority, no bond.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino
Page: 4
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 04/17/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600747

CASE NAME: GARY L & MARY E INSKEEP 1999 FAMILY TRUST

HEARING:

Petition for Payment of Attorney Fees to Court Appointed Counsel
as Guardian Ad Litem

COUNSEL:

CHRISTIE DAVIDSON	(PET)...SU P CHEAH
DANIEL JORDAN INSKEEP TRUST	(TRU)...
GARY LEE & MARY ELIZABETH INSK	(TRU)...
MELISSA CHAINA INSKEEP	(BEN)...PRO/PER
MELISSA CHAINA INSKEEP	(MIN)...PRO/PER
MELISSA CHAINA INSKEEP SUPPLEM	(TRU)...
SANDY TURNER	(PET)...SANDY L. TURNER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Fees and Compensation and Request to be Relieved by Guardian ad Litem for Melissa C. Inskeep, Sandy Turner ["Petitioner"].

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

- 1 Petitioner was appointed on 09/12/17. Petitioner alleges that services have been rendered for which counsel has not been compensated for the period 09/12/17 to 02/24/18.
- 2 Attorney requests reduced fees of \$5,722.50. Billed at the reduced rate of \$350/hour for 16.35 hours attorney time. Itemized [LF, pgs. 8-9]. JTD.
- 3 Petitioner indicates there are ample funds in the trust to pay requests fees and requests that Attorney Su Cheah or the current Trustee, Christie Davidson render these fees, forthwith.
- 4 Proposed Order 02/26/18 includes such other and further orders made as the court deems just and proper.

RECOMMENDATION:

Court's discretion.

(nb)

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

Superior Court of Calif, County of San Bernardino

Page: 5

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 04/17/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600748

CASE NAME: MTR OF BRADLEY H HANSSON

HEARING:

Accounting Review by ***

COUNSEL:

ASHLEY MEYERS

(PET)...ASHLEY MEYERS

BRADLEY H HANSSON

(DEC)...

CHERISE HANSSON

(PET)...ASHLEY MEYERS

VACATE – Status Report filed and set for 05/15/18.

(cs/nb)

Superior Court of Calif, County of San Bernardino

Page: 6

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 04/17/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600948

CASE NAME: CHIRSTOPHER ORTEGA

VACATED

HEARING:

Accounting Review by ***

COUNSEL:

CHRISTOPHER ORTEGA (DEC)...

MELISSA ORTEGA (PET)...ELIZABETH APODACA

FUTURE HEARING DATES:

05/01/18 First and Final Account

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: 7

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

DATE: 04/17/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601007

CASE NAME: MINNIE L COOLEY

HEARING:

Accounting Review by ***

COUNSEL:

BRENDA MOORE (PET)...MICHAEL L KOSLOFF
MINNIE L COOLEY (DEC)...

GENERAL INFORMATION:

Continued from 02/20/18 on courts motion. Notice given by Mr. Kosloff.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued to daughter, Brenda Moore on 01/11/17, full authority, \$250,000 bond.
2. No accounting or status report. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 04/17/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700358

CASE NAME: MTR OF RICHARD MICHAEL GLAUM

HEARING:

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

COUNSEL:

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

Request for Waiver of Court Fees and Costs filed by NICOLE M ANDERSON is
GRANTED
Fee waiver amount due \$143.00
\$40.00 for special notice on 09/22/17
\$103.00 for fax and motion fee on 02/21/18

VACATE – hearing held on 04/10/17.
(nb)

Superior Court of Calif, County of San Bernardino

Page: 9

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 04/17/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800039

CASE NAME: MTR OF WILLIAM RAY HOOVER II

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

JULIE ROBERTSON	(PET)...DAVID M GROSSMAN
WILLIAM RAY HOOVER II	(DEC)...
WILLIAM RAY HOOVER III	(PET)...DAVID M GROSSMAN

VACATE - bond in the amount of \$75,000 posted.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 10

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 04/17/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800057

CASE NAME: Lewis J Bartha

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

JULIE A BARTHA

(PET)...BAINS LAW, .

LEWIS J BARTHA

(DEC)...

VACATE - bond in the amount of \$75,000 posted.
(nb)

Superior Court of Calif, County of San Bernardino
Page: 11
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 04/17/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800249

CASE NAME: DAVID LEE SATTERWHITE

HEARING:
Spousal Property Petition hearing.

COUNSEL:
DAVID LEE SATTERWHITE (DEC)...
LINDA FAYE SATTERWHITE (PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Linda Satterwhite ["Petitioner"].

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

1. Petitioner alleges her name was removed off title when Decedent took out a reverse mortgage because she was not yet 62 years of age to qualify. Copy of Grant Deed affixed [LF, p. 5]. Petitioner states in order to continue the reverse mortgage, the deed must be transferred back into her name.
2. Petitioner requests confirmation of property passing to the surviving spouse as community property. Specifically, real property located San Bernardino. However, petitioner does not set forth facts sufficient to establish a community property interest in the California real property. When were petitioner and decedent married? How was the property interest acquired – with community funds, etc? Need verified supplement.
3. Decedent died intestate with 2 issues who would also share a two-thirds distribution in the estate per Pr.C. §6401 if the real and personal property is separate property of decedent.
4. Need Notice of Hearing with proof of service.
5. ~Proposed Form Order 03/14/18.

RECOMMENDATION:

Need to clear notes 2 & 4 then Court's discretion
(nb)

Superior Court of Calif, County of San Bernardino

Page: 12

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

TRUSTS AND MOTIONS

DATE: 04/17/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1400998

CASE NAME: THE TUMEY TRUST DATED 10/3/89

HEARING:

FIRST Account and Report of BRENDA PERRY, KATRINA GARCIA and
Petition for allowance of fees filed.

COUNSEL:

BRENDA PERRY	(PET)...F ELLIOT GOLDMAN
BROWN WHITE AND OSBORNE, LLP	(BROWN WHITE & OSBORNE, LLP
DEBORAH L. TUMEY HARRISON	(OBJ)...
DEBORAH TUMEY HARRISON	(PET)...JACK B OSBORN
KATRINA GARCIA	(PET)...F ELLIOT GOLDMAN
THE TUMEY TRUST DATED 10/3/89	(TRU)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First Account Current; Petition for Partial Distribution of Trust Assets and Petition for Fees by Successor Co-Trustees, Brenda Perry and Katrina Garcia ["Petitioners"].

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

1. Settlor, Sandra J. Tumey, died on 10/21/10.
2. Accounting period 10/21/10 to 01/31/18 [7.3 years].
 - a. 10/21/10 to 04/05/16 for period of prior Successor Trustee, Deborah Tumey Harrison's term as Successor Trustee.
3. Attorney Goldman requests fees of \$47,012.89 to be paid from trust proceeds otherwise due Deborah Tumey Harrison in accord with the terms of the Settlement Agreement [LF, pgs. 93-105]. Billed at the reduced rates of \$300/hour for attorney time and \$120/hour for paralegal time for period through 05/26/16. Itemized [see supp. filed 02/23/18, LF, pgs. 7-69]. **JTD**.
4. Petitioners allege despite multiple oral and 8 requests in writing to Deborah Tumey Harrison's attorney, Jack B. Osborn, Esq. of Brown White & Osborn for copies of their bills broken down as to services provided to Deborah Tumey Harrison, Brown White & Osborn have failed to provide copies of their bills LF, p. 29]. Petitioners request that the Court confirm the \$3,000.00 payment made

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

to Brown White & Osborn as full, complete, and final payment of any fees due them from the trust for services to the trust, and further find that any balance due Brown White * Osborn in excess of said \$3,000.00 is due Brown White & Osborn solely from Deborah Tumey Harrison and that Brown White & Osborn has no further claim against the trust for payment of fees. **JTD.**

-
5. Account period 04/06/16 to 01/31/18 for period petitioners covered.
 6. Assets on Hand \$534,303.82 consisting of \$202,303.82 in cash and remaining in real property [LF, p. 285].
 7. Trust waives bond.
 8. Petitioners request compensation of \$20,000 (\$10,000 each). Generally described. Itemized [LF, pgs.]. **JTD.**
 9. Attorney Goldman requests fees of \$37,977.00 to be paid from general trust funds in accord with the terms of the Settlement Agreement [LF, pgs. 93-105]. Billed at the reduced rates of \$300/hour for attorney time and \$120/hour for paralegal time for period 05/27/16 to 01/258/18. Itemized [see supp. filed 02/23/18, LF, pgs. 71-118]. **JTD.**
 10. Of the total fees to date of Attorney Goldman in the sum of \$84,989.89, Petitioners have previously paid the sum of \$10,283.00 and request that the Court order repayment of said sum by payment of \$5,000.00 to Katrina Garcia and \$5,283.00 to Brenda Perry as reimbursements for payments previously made and payment of the balance of the fees to Attorney Goldman in the sum of \$74,706.89 for fees incurred through 01/25/18 and authority to pay the fees of Attorney Goldman incurred after that date without further court order. **JTD.**
 11. **Need** bank/financial statements to support beginning and closing balances via verified supplement.
 12. Petitioner request the Court grant and approve the surcharges and credits and proposed distributions as set forth in paragraphs 55-58 [LF, pgs. 41-49]. **JTD.**
 13. Petitioners request authority to withhold the sum of \$20,000 as a reserve. **JTD.**
 14. Petitioners further request authority to distribute the balance of the reserve account one-third each to Brenda Perry, Katrina and Deborah Tumey Harrison (credited first against the outstanding balance due the trust and then the balance to Deborah Tumey Harrison) without further court order. **JTD.**
 15. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear note 11 then Court's discretion. If approved, set next hearing for Accounting Review for **03/26/19**. Any account to be filed 30 days' before hearing.

Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 13

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 04/17/18 TIME: 8:35 DEPT: S37P

CASE#: TRU PS1800038

CASE NAME: PEARL E SCOTCH REVOCABLE TRUST

HEARING:

Petition for Order to Confirm Existence of Trust and for
Appointment of Successor Trustee

COUNSEL:

JARRETT G ROTH

(PET)...BERMAN & BERMAN

PEARL E SCOTCH REVOCABLE TRUST (TRU)...

X-REF: PROPS 1700903 William K. Scotch

Currently under review by Legal Research.
(LR)

Notice given.
(nb)

Superior Court of Calif, County of San Bernardino

Page: 14

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

DATE: 04/17/18 TIME: 9:30 DEPT: S37P

CASE#: CIV DS1707848

CASE NAME: HERNANDEZ -V- HERNANDEZ

SEE ALSO 22

HEARING:
Trial Setting Conference

COUNSEL:

DUGLAS HERNANDEZ (PLA)...LAW OFFICES OF JAMES S TERRELL
MARIA E HERNANDEZ (DEF)...

XREF: CONPS1700387 (Douglas Hernandez)

No notes – TSC.
(nb)

5. Current bond for Trust is \$178,000. Petitioner requests bond be increased by \$18,000 for new bond of \$196,000. Appears sufficient. **JTD.**
6. Petitioner does not request compensation or reimbursement.
7. Attorney requests fees of \$3,834.00 for services to the conservatorship and trust estates. Billed at \$300/hour for 7.5 hours' attorney time and \$120/hour for 13.2 hours' paralegal time for the period 05/05/17 to 03/05/18. Itemized [LF, pgs. 63-65]. **JTD.**
8. Court to review Inter-Office Memo and CI Report filed 03/29/18.
9. **Need** conservatee's residence(s) during the accounting period per Local Rule 20-1406(a) via verified supplement.
10. Property on Hand at Beginning of Account Period for Trust does not match Property on Hand at End of prior Account Period as Bank of America Account XXX0962 is to no longer to be accounted for per prior Chambers Conference. Question whether \$1,000 monthly transfers continue to be made and how allowable disbursements can be determined if this account is not accounted for? Need verified supplement.
11. ~Proposed Order 03/07/18.
12. ~Proposed Amended Form Order 03/07/18.

RECOMMENDATION:

Need to clear notes then Court's discretion re: bond and fees. If approved, set next accounting review for **02/19/19** (if one year accounting) or **02/18/20** (if two year accounting).

(nb)

Superior Court of Calif, County of San Bernardino
Page: 16
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 04/17/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400327

CASE NAME: GREGORY SMITH

HEARING:

FIRST Account and Report of CASEY HAGOOD and Petition for allowance of fees filed.

COUNSEL:

CASEY HAGOOD	(CP)...PRO/PER
GREGORY SMITH	(CTE)...MATTHEW E. SHEASBY
HEATHER ROBINSON	(CPE)...RICHARD A. LEPORE
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL

Request for Waiver of Court Fees and Costs filed by HEATHER ROBINSON is GRANTED
Fee waiver amount due \$465.00 for Petition for conservator etc on 11/13/14

GENERAL INFORMATION:

Continued from 12/19/17 on Court's motion. Amended accounting to be filed by 03/17/18. Mr. Sheasby will assist/give guidance to Mr. Hagood in preparing accounting.

THIS CASE IS SET FOR HEARING ON **AMENDED** (03/14/18) First Account Current by Conservator of the Estate, half-brother, Casey Hagood ["Petitioner"].

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

1. Final Inventory and Appraisal filed 10/25/16 reflects date of appointment on 03/04/16. However, petitioner was appointed at 12/16/15 court trial. **Need** corrected Inventory and Appraisal with bank statement showing the account balance immediately preceding the date the conservator was appointed per Pr. C. §2620(c)(2).
2. Accounting period 03/09/16 to 01/06/18. However, accounting should begin as of date of appointment on 12/16/15. **Need** amended account.
3. Assets on Hand \$58.57 consisting of cash.
4. Current bond of \$45,000. Appears sufficient.
5. Petitioner does not request compensation.
6. Petitioner requests reimbursement for costs totaling \$5,052.00. Generally described [LF, p. 3].

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.**

- a. Petitioner indicates payments totaling \$4,250.00 have been made for attorney services to Bristol Hayes & Associates. Question in what capacity attorneys provided service as petitioner is still pro per and accounting still has deficiencies? **Need** verified supplement.
7. Property on Hand at Beginning of Account Period does not match Inventory and Appraisal filed 10/25/16, which is also incorrect. **Need** Corrected Summary of Account and affected schedules.
8. Receipts – Schedule A does not include beginning or ending account periods. **Need** same.
9. Disbursements – Schedule C include several “Customer Withdrawals” totaling \$13,740.00 and a “Teller Withdrawal” for \$3,700.00. **Need** further clarification via verified supplement.
10. Disbursements – Schedule C includes monthly transfers to Heather Robinson. What does \$3,300 pay for? **Need** itemization for subject amount.
11. **Need** Notice of Hearing with proof of service to include Veterans Administration.
12. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need amended accounting to be set on first check calendar not sooner than **06/19/19 or thereafter**. Any account to be filed 30 days before hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 17

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

DATE: 04/17/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1500208

CASE NAME: Teresa M. Morris

HEARING:

Accounting Review by ***

COUNSEL:

LEMUEL MORRIS	(PCR)...PRO/PER
LEMUEL MORRIS	(TC)...PRO/PER
MARRIETTA MORRIS METOYER	(PET)...PRO/PER
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
TERESA M. MORRIS	(CEP)...RONALD T WASSERMAN

GENERAL INFORMATION

Continued from 02/06/18. No appearance. Lemuel Morris and Marrietta Metoyer are ordered to be present at next hearing if accounting not filed. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Accounting Review by daughter, Marrietta Metoyer

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

- 1 Ex Parte Order to Dispense with Accounting and Order entered 12/09/16; waiver of account filed 04/11/18.
- 2 CI Report filed.
- 3 ~Proposed Form Order 04/11/18.

RECOMMENDATION:

RFA. If approved, set next hearing for Accounting Review on **03/05/19**.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 18

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

DATE: 04/17/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600359

CASE NAME: MTR OF DAVID NIKKO DIAZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of DEBORAH CLARK

COUNSEL:

DAVID NIKKO DAIZ (CTP)...PRO/PER
DEBORAH CLARK (CPE)...PRO/PER

GENERAL INFORMATION

Continued from **11/20/17**. Counsel reports Rossana Mitchell's substitution of attorney was rejected as incomplete by the Court. The Court orders Rossana Mitchell to be present at next hearing and to assist her client with preparing the documents required for compliance hearing. Notice given by Mr. Roth.

Continued from 02/06/18 on courts motion. Notification of conservatee's right and determination of conservatee's appropriate level of care form filed in the courtroom.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Deborah Clark, sister, appointed conservator of the **person only** on 04/17/17.
2. **Need** Care Plan in accord with Pr.C.§2352.5.
3. Proof of Mailing to Notification of Conservatee's Rights, Section 5 is incomplete. Question whether a conformed copy of the Order Appointing Probate Conservator was also served? Court to inquire.
4. Proof of Mailing does not include petitioner, father or mother and grandparents. **Need** proper service.
5. Appropriate Level of Care filed.

RECOMMENDATION

Inquire status
(cs/nb)

Future Hearing:

07/12/18 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: 04/17/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700038

CASE NAME: MTR OF EXIE MOORE

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ANNIE R LAMBERT	(CP)...PRO/PER
EXIE MOORE	(CEP)...EDWARD B FISCHEL
EXIE MOORE	(CEP)...PRO/PER
JAMES E MOORE	(CPE)...PRO/PER

XREF: CIFMS1600005 (Exie Moore-n-James Moore)

GENERAL INFORMATION

Ex Parte orders denied 02/07/17.

Continued from **03/13/17**. The Court determines that there is NO conservatorship in place at this time. Competing petition to be filed today by Annie Lambert. The Court orders that related action CIFMS1600005 be set to trail this matter. Clerk's Office to order file from Morongo Basin. Attorney Edward B Fischel is appointed.

Continued from 04/10/17. The Court waives return of citation as proposed conservatee is present in court. The Court informs parties the James Moore's petition has legal priority. The Court recommends the following pending next hearing: Exie Moore should move back into her home. Only Exie and James Moore should live in the home. Family and friends that visit should not be there overnight or for extended periods of time. Annie Lambert and Marshalla Parker should have daily telephone contact. If Exie Moore doesn't want to talk, she needs to tell them, not James Moore. Visitation orders made. James and Exie Moore to meet at 4pm today at a restaurant in Morongo for an early dinner and discuss when/if she wants to move home and how that will be accomplished.

Continued from 07/03/17. Court appoints Sandy Turner as Guardian Ad Litem for Exie Moore. Exie Moore states to parties, Counsel, and Guardian Ad Litem in the hallway that she wants to move back into her home with her son. Exie Moore to move back into her home, today. Guardian Ad Litem to meet with parties prior to 07/14/17. Marshalle Parker deemed served by her appearance today. Court Investigator Report filed.

Continued from **09/11/17** to clear probate notes. **\$50,000 bond required.** Competing petition dismissed as to entire action for lack of prosecution.

Continued from **11/20/17**. The court finds that temporary conservatorship is in the best interest of Exie Moore. James E Moore is appointed Conservator of the person Exie Moore.

Continued from 02/06/18 for notice to sole issue of sibling, Martha Moore. Ms. Turner gives an oral report to the Court stating Exie Moore's name is on the home, that there are very little assets, and that there is an unimproved property in Chicago, Illinois. Mr. Moore reports property in Chicago is about to be lost if property taxes are not paid within 30 days.' Parties report mortgage on Ms. Moore's home is only one month behind.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by son, James E. Moore.

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

1. Section 3e(5) to petition [LF, p. 4] does not include estimated value of estate consisting of public benefits and real property. **Need** verified supplement.
2. Petitioner requests bond not be required because proposed conservator only receives public benefits. **Need** estimated value of estate to determine appropriate bond. **Need** \$50,000 bond as required by court on 09/11/17.
3. Section 5c(1) to petition [LF, p. 6] indicates Dept. of Aging and Adult Services involvement.
4. Petitioner requests dementia powers; report by court-appointed counsel, Edward Fischel, filed 04/03/17 and 06/26/17.
5. Report of Sandy Turner, GAL, filed 07/19/17.
6. Court Investigator Report of No Report filed 03/06/17. CI Report filed 06/29/17.
7. Petitioner seeks medical powers. Medical Capacity Declaration filed 02/01/17, Section 1 & 2 is incomplete; and signature lines are not dated. Supp. filed 09/14/17 is missing page 3 of Capacity Declaration. **Need** completed forms.
8. List of Required Contacts filed 11/20/17 does not include petitioner; incomplete as to relationship of Kim Chamber; and incomplete as to address of Kiera Williams. **Need** complete list of required contacts.
 - a. Parties report Kim and Kiera Williams are mother and daughter and are family friends, not relatives.
9. **Need** Due Diligence Declaration as to sibling Martha Moore.
10. **Need** Notice of Hearing and proof of service to Martha Moore as directed by court on 02/06/18.
11. Certificate of Completion re Conservatorship Class filed 02/02/17.
12. ~Proposed Form Order/Letters 02/01/17.

RECOMMENDATION:

Need to clear notes 1-2 & 7-10 then Court's discretion re bond. If approved, set hearing for Compliance Review for **11/20/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-**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.**

355); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **06/25/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.
(nb/lh/cs/nb)

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

Superior Court of Calif, County of San Bernardino

Page: 20

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

DATE: 04/17/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700047

CASE NAME: MTR OF GLADYS LAMRIA DIASMARA HUTAGAOL

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of HENDRICK HUTAGAOL

COUNSEL:

DIAN HUTAGAOL	(CP)...PRO/PER
GLADYS LAMRIA DIASM HUTAGAOL	(CTP)...JAMES B CHURCH
GRACE HUTAGAOL	(CP)...PRO/PER
HENDRICK HUTAGAOL	(CP)...PRO/PER

GENERAL INFORMATION

Hendrick Hutagaol (father), Dian Hutagaol (mother) and Grace Hutagaol (sister)
appointed Limited Conservators of the Person on 09/12/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

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

RECOMMENDATION:

Inquire status.
(nb)

Superior Court of Calif, County of San Bernardino

Page: 21

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

DATE: 04/17/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700118

CASE NAME: OMAR GAITAN

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of OLGA PLASCENCIA

COUNSEL:

OLGA PLASCENCIA (CP)...
OMAR GAITAN (CTP)...WALTER T. MOORE

GENERAL INFORMATION

Olga Plascencia (mother) appointed Limited Conservator of the person on 09/12/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

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

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 22

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

DATE: 04/17/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700387

CASE NAME: DUGLAS HERNANDEZ

SEE ALSO 14

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DUGLAS HERNANDEZ (CTP)...MITCHELL I ROTH
MARIA ESTHER HERNANDEZ (CP)...PRO/PER

XREF: CIVDS1707848 (Hernandez-v-Hernandez)

GENERAL INFORMATION

Continued from **11/27/17**. Mr. Terrell report there is a related case, CIVDS1707848. Sherri Kastilahn is appointed counsel and Mitchell Roth is appointed GAL.

Continued from 02/05/18. Ms. Kastilahn's report filed in courtroom. Ms. Kastilahn reports Duglas Hernandez is receiving public benefits from San Fernando Health and Human Services. Petitioner and proposed conservatee's sister report conservatee is living with petitioner, but proposed conservatee reports he is living in San Fernando Valley. The Court orders petitioner turn over check, money order and cash she is holding in the approximate amount of \$16,446 to Sherri Kastilahn to be held in her client trust account pending further order of the Court. Ms. Kastilahn not to release any funds, from her client trust account, without further order of the Court. The Court will refer matter to Mental Health personnel for possible investigation. Referred to Court Investigator for investigation and report.

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

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

1. Amended petition filed 01/11/18 appears to be a supplement with the missing information re powers requested and jurisdiction response. Does Court wish to deem as supplement? If not, Court may wish to trail.
2. It appears that LPS conservatorship would be appropriate.
3. Court to see Confidential Supplement Information form filed 10/20/17.

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.**

4. **Report of court appointed counsel, Sherri Kastilahn filed.**
5. **Need** report by Guardian Ad Litem, Mitchell Roth.
6. Petitioner seeks medical powers. **Need** Capacity Declaration (form GC-335).
7. **Need** notice of hearing and proof of service on Maria De Escobar, maternal grandmother or file Due Diligence Declaration.
8. **Court Investigator report filed.**
9. Return of Citation filed.
10. Certificate of Completion of the Conservatorship Training Class.
11. ~Proposed Form Order: 10/20/17

RECOMMENDATION

Need to clear notes 4-7, **Court discretion re note 1** . If approved, set hearing for Compliance Review for **11/19/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(cs/nb)

Superior Court of Calif, County of San Bernardino

Page: 23

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 04/17/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800049

CASE NAME: WALTER FRED BRADY JR

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MARY ELLEN ELDREDGE (PET)...CHRISTINA FERRANTE

WALTER FRED BRADY JR (CEE)...

X-REF: CON- PS1800052 (Robert James Brady) in S35

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by sister, Mary E. Elderedge ["Petitioner"].

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by parents.

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. **Need** appointment of counsel and report by same.
3. Medical Capacity Declaration does not include doctor's phone number. Judge to determine if sufficient.
4. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to give and consent to all medical decisions for the proposed limited conservatee.
5. Citation returned SERVED.
6. Court Investigator Report filed.

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

7. **Need** Inland Regional Center Report.
8. **Need** Certificate of Completion re Conservatorship Class.
9. ~Proposed Form Order 02/27/18.

RECOMMENDATION:

Court to appoint counsel then need to clear notes. If approved, set hearing for Compliance Review for **11/20/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 24

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

DATE: 04/17/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800069

CASE NAME: MTR OF GILDARDO ALVAREZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

GILDARDO ALVAREZ (CEP)...
SARA CORTE (CPE)...PRO/PER

XREF: CIVDS1504049 (24-Seven Home Health-v-Rodriquez)

GENERAL INFORMATION

Sara Corte appointed temporary conservator of the person and estate on 03/15/18.
Attorney Craig M. Parker appointed for conservatee. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by daughter, Sara Corte ["Petitioner"].

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

- 1 Section 1 c (2) to petition re bond is incomplete. Estimated estate valued at \$110,000 consisting of personal property and real and rental property whose value is unclear. Suggest minimum bond of \$110,000 until real properties' value can be confirmed. JTD.
- 2 Petition, Section 3 b (7) is incomplete as to relationship of petitioner. However, section 3 c (4) indicates petitioner is conservatee's daughter.
- 3 Section 11 b (2) to petition does not include a complete address for sibling Martha Alvarez. Need same via verified supplement.
- 4 Petition [LF, p. 13] indicates Conservatee has a POA in Mexico that he purportedly wanted to cancel upon discovering the attorney-in-fact, had been stealing money and taking advantage of Conservatee before Conservatee suffered a stroke.
- 5 Screening Form, section 1c is incomplete as to state driver's license was issued from. Need verified supplement.
- 6 Need List of Required Contacts Form.
- 7 Court to review Supplemental Information form [LF, p. 4].
- 8 Petitioner seeks Pr. C. § 2590 powers to sell real and/or personal property, including conservatee's primary residence and proceeds to be used for

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.**

- Conservatee's care and personal needs. Suggest Court require a separate petition after appointment with required showing per Pr. C. 2540 et seq. JTD
- 9 Petitioner seeks medical powers. Need Medical Capacity Declaration.
 - 10 Need report of court appointed counsel, Craig Parker.
 - 11 Court to review Court Investigator's Report of No Report.
 - 12 Need return of Citation
 - 13 Need Notice of Hearing and proof of service of Due Diligence Declarations.
 - 14 ~Proposed Form Order/Letters 03/09/18.

RECOMMENDATION:

Need to clear notes 1-3, 5-6, 9-10, & 12 -13 then Court's discretion re: bond. If approved, set hearing for Compliance Review for **11/20/18** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re: Accounting Review for **06/25/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.
(nb)