



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 04/18/18

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

Destruction of Filed Documents:

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

Contacting the Probate Examiners:

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

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

03/27/18lh; 4/12/18 lh

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PROBATE

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

CASE#: PRO DS1100003

CASE NAME: MATILDA ANABELLE HILLS

HEARING:

Accounting Review

COUNSEL:

LOMA LINDA UNIVERSITY

(PET)...CLAYSON, BAINER & SAUNDERS

MATILDA ANABELLE HILLS

(DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Loma Linda University, Administrator with Will Annexed

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

1. Court approved 5th status report on 04/19/17.
2. Accounting or Status Report now due.

RECOMMENDATION

Inquire status.

(lh)

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

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

CASE#: PRO PS0800100

CASE NAME: MARIE ANN LUCIER

HEARING:

Final Report and Current Account and Report of DENISE ENGLISH
and Petition for allowance of fees filed.

COUNSEL:

DENISE ENGLISH (PET)...ALTHOUSE AND MCDONOUGH
MARIE ANN LUCIER (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Report and Current Account and Report
and Petition for allowance of fees by Denise English

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

1. Assets on hand: \$69,953.5, cash
2. Statutory fees of \$696.71, each, requested by petitioner and attorney
Althouse. Calculated.
3. Petitioner requests reimbursement for advanced costs in the amount of
\$25. Itemized.
4. Petitioner requests reserve of \$5,000 Note: if approved, *need informal
account for reserves per Local Rule 20-911 prior to filing ex parte petition for
final discharge.*
5. Notice was given.
6. ~Proposed order: 2/7/18

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing of receipts and final
discharge to include informal account re reserves for **05/01/19**.

(lh)

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

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

CASE#: PRO PS0900373

CASE NAME: MTR OF DAISIE ANN CERVANTES

HEARING:

Sixth Current Account and Report of MELVIN L FRIEDLAND and
Petition for allowance of fees filed.

COUNSEL:

MELVIN L FRIEDLAND (PET)...JACK H ANTHONY
DAISIE ANN CERVANTES (DEC)...
DAISIE ANN CERVANTES (MIN)...
DAISIE ANN CERVANTES SPECIAL NEDS TRUST (TRU)...
AMERICAN CONTRACTORS INDEMNITY (TP)...PRO/PER
ESTHER CERVANTES (JACK H ANTHONY)

Waiver of Court Fees and Costs filed by MELVIN FRIEDLAND & DAISIE ANN CERVANTES is GRANTED
TOTAL FEES WAIVED TO DATE: \$1215.00

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Sixth Account Current of SNT and Petition for
Fees by Successor Trustee of SNT, Melvin L. Friedland.

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

1. Account period 01/01/17 to 12/31/17
2. Assets on hand **\$2,275,649.82** consisting of \$1,810,690.23 in cash and the balance in securities, real property and personal property.
3. Petitioner requests fees of **\$1,925.00** billed at \$110/hour for 17.5 hours. Itemized [LF, pgs. 30-33].
4. Disbursements include reimbursements to Esther Cervantes for personal items totaling over \$6,000. **Need** itemization of expenditures via verified supplement.
5. Attorney requests fees of **\$3,956.95** for 5.40 hours at the reduced rate of \$350/hour for attorney; \$50-90/hour for 13 hours for paralegal time, and reimbursement of costs of \$1,041.95. Itemized [LF, pgs. 30-48]. JTD.
6. Bond is currently posted in the amount of \$1,759,711.71. **Petitioner is seeking a decrease of bond by \$29,132.14 for a total bond \$1,730,711.71.** Appears sufficient. **JTD.**

7. ~Proposed Order: 02/07/18 Note: proposed order signature line is for Judge Ludvigsen.

RECOMMENDATION:

Need to clear note #4. If approved, set hearing re next Accounting Review for **02/27/19** Account to be filed 30 days in advance.

(lh)

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

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

CASE#: PRO PS1500071

CASE NAME: MELODIE ANN RYLANDER

HEARING:

Probate status report

COUNSEL:

ALLEN RYLANDER JR (PET)...JOELLE LEE A. NICHOL
MELODIE ANN RYLANDER (DEC)...

XREF: CIVDS1601630 *PORTFOLIO RECOVERY-V-MELODIE RYLAN*

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Status Report of Allen Rylander, Executor

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

1. Petitioner alleges estate is not in a condition to close as real property has not yet been sold.
2. Petitioner requests an additional 9 months to close the estate. **JTD**
3. **Need** Notice of Hearing and proof of service as to Allen Rylander, Sr, in accord with Pr.C. § 12201. Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. § 10950. **This form of notice is mandatory.**
4. ~Proposed Order: 02/14/18

RECOMMENDATION:

Need notice then Court's discretion. If approved, set next hearing for Accounting Review for **01/16/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(lh)

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

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

CASE#: PRO PS1500210

CASE NAME: ELAINE RUTH DUVALL

HEARING:
Hearing re Final Discharge

COUNSEL:

BRUCE G. DUVALL (PET)...MARTIN LAW FIRM
ELAINE RUTH DUVALL (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge re Bruce G. Duvall,
Administrator

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

1. Final Account approved on 04/12/17. Proposed Order submitted 04/25/17 and 05/04/17 were returned by Court for corrections. **Need revised Order after hearing.**
2. Receipts were filed 05/04/17.
3. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.

(lh)

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

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

CASE#: PRO PS1600193

CASE NAME: MARILYN DOSKOCIL

HEARING:

Hearing Re: STATUS CONFERENCE

COUNSEL:

NORMAN GIEBELER (PET)...LAW & STEIN
MARILYN DOSKOCIL (DEC)...
AUCTION-CA FINANCIAL SRVS (TP)...

Status—no notes—JTD

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

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

CASE#: PRO PS1700251

CASE NAME: Donna Lee Campbell

HEARING:

FIRST AND FINAL Account and Report of HOLLY A. PARKER and
Petition for allowance of fees filed.

COUNSEL:

HOLLY A. PARKER (PET)...LAW OFFICES OF DOMINIC E RAINO
DONNA LEE CAMPBELL (DEC)...

GENERAL INFORMATION:

Continued from 01/17/18. No appearance. Judicial Assistant received phone call requesting additional time to clear probate notes. Court orders Counsel for administrator to be personally present at next hearing on 04/18/18.

THIS CASE IS SET FOR HEARING ON Waiver of First and Final Account and Report of Administrator, and Petition for Fees by Holly A. Parker, administrator

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

1. Assets on hand: **\$502,950**, of which **\$2,950** is cash and remaining is real property.
2. Petitioner requests Court Approval of Settlement Agreement entered into between heirs on 10/01/17. Administrator Holly A. Parker will advance to estate the sum of \$35,000; Craig M. Campbell to receive \$25,500 as his full distributive share of the estate; Holly A. Parker to receive real property and residue of estate. Parties waive accounting. See attached Settlement Agreement [Acct, 10/03/17, LFpg13-19]. JTD
3. Supp 03/15/18- Petitioner obtained a loan secured by estate's real property for \$45,000 to provide both liquidity for fees and distribution to heir, Craig M. Campell. Escrow statement and Deed of Trust attached at **Supp. 3/15/18, LFpg10-14.**
4. Administrator waives statutory fees.
5. Attorney requests statutory fees of \$13,056. Calculated.
6. Notice was given.

7. Prayer indicates petitioner to be discharged upon *filing* of Ex Parte Petition for Final Discharge. Note: petitioner is not discharged until entry of Court order for final discharge.
8. No proposed Order submitted. Submit after hearing.

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **04/24/19**.

(lh)

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

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

CASE#: PRO PS1701138

CASE NAME: JOSE LORENZO VASQUEZ

SEE ALSO 9

HEARING:

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

COUNSEL:

LAURA ALICIA RODRIGUEZ (PET)...MICHAEL C MADDUX
JOSE LORENZO VASQUEZ (DEC)...
JAMES VASQUEZ (PET/OBJ)...ELDER LAW CENTER, P.C.

XREF: PROPS1600462 VASQUEZ TRUST

GENERAL INFORMATION:

Continued from 01/03/18 at request of petitioner to address notice/service issues.
**Continued from 03/07/18. Ronald Ask indicates objections to this petition have
been filed and competing petition has been filed and set for hearing on 04/18/18.**

THIS CASE IS SET FOR HEARING ON

- **Petition #1 [filed 11/14/17]** for Probate, Letters Testamentary with Full Authority under IAEA by Laura Rodriguez (executor/caregiver/niece)
- **Petition #2 [filed 03/06/18]** for Probate, Letters Testamentary with Full Authority under IAEA by James Vasquez, (son)

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

Petition #1 by Laura Rodriguez (executor/caregiver/niece)

1. Petitioner requests assets to be placed in blocked account upon sale of real property. Estate assets consist of real property estimated at \$250,000, and remaining \$6,000 in personal property. **JTD.**
2. Petitioner is identified within decedent's will as a caregiver and beneficiary.
3. Need verified supplement to amend list of relatives in item #8 of petition to include issue of predeceased son, Richard Vasquez. **Due Diligence Declaration filed 03/07/18 as to Isaac Vasquez and Catherine Vasquez, issue of predeceased son, Richard Vasquez. JTD**
4. **Objection and will contest filed on 03/06/18 by James "Jimmy" Vasquez, son of decedent. However, Will Contest and Summons must be served in**

the manner required in a civil action generally. Pr.C. §_§8250; CCP §§412.10–417.40. Suggest Court continue 6 weeks to provide proper service?

5. **Answer to Will Contest filed by Luran Rodriguez on 04/03/17.**
6. ~Proposed form Order: 11/14/17

Petition #2 by James Vasquez (son)

7. Petitioner requests no bond as provided in will dated 03/28/16.
8. Will dated 03/28/16 nominates James Vasquez and Laura Rodriguez to serve as co-executors. **Need** declination to act by Laura Rodriguez.
9. Notice of Petition to Administer Estate filed 4/4/18; however, form is incomplete at item #5 as to request for IAEA authority. **Need correct Notice and proof of service.**
10. **Need** Proof of Publication.
11. ~Proposed form Order: 03/06/18

RECOMMENDATION:

Matter is contested. Suggest Court continue to **05/30/18** for proper service re Will Contest.

Need to clear notes #4; 7-9. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **06/26/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

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

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

CASE#: PRO PS1701138

CASE NAME: JOSE LORENZO VASQUEZ

SEE ALSO 10

HEARING:

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

COUNSEL:

LAURA ALICIA RODRIGUEZ (PET)...MICHAEL C MADDUX
JOSE LORENZO VASQUEZ (DEC)...
JAMES VASQUEZ (PET/OBJ)...ELDER LAW CENTER, P.C.

XREF: PROPS1600462 VASQUEZ TRUST

See notes on prior matter #8.

(lh)

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

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

CASE#: PRO PS1800113

CASE NAME: ROBERT FERDINAND BUESCHING AKA ROBERT F. BUESCHING

HEARING:

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

COUNSEL:

ROBERTA L. BUESCHING (PET)...ALBREKTSON & SHUMATE
ROBERT FERDINAND BUESCHING (DEC)...
STEPHANIE A BUESCHING-SCHWINGE (PET)...MIRAU, EDWARDS, CANNON, LEWI

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Will
Annexed with full authority under IAEA by Stephanie A. Buesching-Schwengel,
daughter/sole beneficiary

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

1. Will does not waive bond as to petitioner; however, petitioner is sole beneficiary.
Estimated value of estate is \$439,416, consisting of \$284,000 in real property
and remaining in personal property. **JTD**
2. **Need** Notice of Petition to Administer Estate with proof of service as to James
Buesching and Rikki Ciancio, issue of predeceased son, Rodney Buesching per
Pr. C. §8110(a).
3. ~Proposed Form Order: 02/13/18

RECOMMENDATION

Need to clear note #2 then Court's discretion re bond. If approved, set
Accounting/Status Review for **06/26/19**. Any accounting to be filed 30 days in advance
local rule 20-901. Note requirements of local rule 20-908.

(lh)

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

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

CASE#: PRO PS1800130

CASE NAME: PAUL M SAFFIAN

HEARING:

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

COUNSEL:

ROBERT J SAFFIAN (PET)...GEORGE W YOUNG
PAUL M SAFFIAN (DEC)...

GENERAL INFORMATION

Continued from 03/21/18 to clear probate notes.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with limited authority under IAEA by Robert J. Saffian, brother/nominee

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

1. Both heirs waive bond. Estimated value of estate is \$302,000 based on real property and \$2,000 in personal property. JTD
2. Duties and Liabilities filed 02/27/18; form not dated at signature. JTD
3. No proposed Order submitted.

RECOMMENDATION

Court's discretion. If approved, set Accounting/Status Review for **06/26/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1800207

CASE NAME: BRYCE EDWIN BAKER

HEARING:

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

COUNSEL:

ANGELA D REYNOLDS (PET)...JOELLE LEE A. NICHOL
BRYCE EDWIN BAKER (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by **Angela D. Reynolds**, Executor/sole beneficiary

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

1. Will waives bond. Estimated value of Estate is \$475,000. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code, § 8481(b). **JTD**
2. ~Proposed Form Order: 03/05/18

RECOMMENDATION

RFA, Court's discretion re bond. If approved, set Accounting/Status Review for **06/26/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: VPR VS002893

CASE NAME: ESTATE OF ANN E LUNA

HEARING:

Petition to approve Fifth Account and Report of STEPHEN C LUNA
and Petition for allowance of fees filed.

COUNSEL:

REGINA M BADILLO	(PET)...CHARLES P BROWN
ANN ELOISA LUNA	(DEC)...
BARRY ESKIN	(PET)...PRO/PER
STEPHEN C LUNA	(PET/OBJ)...GAINES LEGAL SERVICES
ALMA CARPENTER	(CHARLES P BROWN)
CHARLES P BROWN ESQ	

GENERAL INFORMATION

Continued from 3/21/18 at request of Counsel to clear probate notes.

THIS CASE IS SET FOR HEARING ON 5th Account Current and Report of Status of
Stephen C Luna, Administrator

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

1. Accounting period covers 11/15/16 to 11/14/17.
2. Property on hand: \$659,701.21, consisting of \$24,699.31 cash and remaining in annuity payments to be received.
3. Disbursements on Schedule 3 include 50% annuity payments paid to beneficiaries, Stephen Luna; Anthony Luna; Amanda Badillo; Michael Luna, and 50% of annuity payments to Charles Richmond for legal fees; however, sums paid to beneficiaries vary in increments during the month of March; it is not clear if disbursements conform to Order on 4th account entered 03/28/17. [Acct, 12/13/17, LFpgs9-10]. **Need reconciliation of cash disbursements made to beneficiaries from 03/11/17 to 03/19/17. Also, question why disbursements are being made to Amanda Badillo on behalf of beneficiary Regina Badillo? **Supp 3/28/17, LFpg3; 8, alleges Regina Badillo does not have a bank account and checks are paid to her daughter, Amanda Badillo, on her behalf. Regina filed bankruptcy and \$10,000 were held and turned over to Bankruptcy trustee. Reconciliation attached.****

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. Notice is complete.
5. No proposed order submitted. Submit after hearing.

RECOMMENDATION:

Court's discretion. If approved, set Accounting/Status Review for **01/16/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1800212

CASE NAME: MTR OF JAMES EMERIK YENO

HEARING:

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

COUNSEL:

SHELLY NUZZO (PET)...DAVID PHILIPSON
JAMES EMERIK YENO (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with
Full Authority under IAEA by Shelly Nuzzo, Executor/granddaughter

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

1. Will waives bond. Estimated value of estate is \$35,000, real property only. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code, § 8481(b) **JTD**
2. ~Proposed Form Order: 02/27/18

RECOMMENDATION

RFA , Court's discretion re bond. If approved, set Accounting/Status Review for **06/26/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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

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

CASE#: CIP DS1700202

CASE NAME: CORDARO -V- BRIGHT FUTURES

HEARING:

Hearing Re: REVIEW OF SPECIAL NEEDS TRUST

COUNSEL:

GINO CORDARO

(PET)...GREER & RINEER

DANIEL CORDARO

(CLA)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON REVIEW OF SPECIAL NEEDS TRUST

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

1. Matter set on 3/21/18 at hearing re Petition for Compromise of Disputed Claim.
2. Civil (unlimited) petition of Corado was granted. Court set hearing for review of SNT and will sign Order on the dated of 4/18/18.

RECOMMENDATION

Court's discretion.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIPS

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

CASE#: CON PS1500230

CASE NAME: LETHA J. SUNDSTROM

HEARING:

Hearing re Final Discharge

COUNSEL:

ERIK SUNDSTROM

(CPE)...PRO/PER

LETHA J. SUNDSTROM

(CEP)...WALTER T. MOORE

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge re Erik Sundstrom

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

1. Final Account approved 04/12/17.
 - a. **Need** Order after hearing;
 - b. Show note indicates check #107 for \$435 filing fee was returned by bank as a closed account on 10/20/16. Current outstanding fees, including NSF fee: \$475. Court to inquire.
2. **Need** receipt from Letha Sundstrom.
3. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.

(lh)

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

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

CASE#: CON PS1600010

CASE NAME: MTR OF JANICE MARLENE ORMEROD

HEARING:

Hearing re Final Discharge

COUNSEL:

WALLACE D MINDER	(CPE)...RYAN J GALLANT
ANDREA M ORMEROD	(CPE)...RYAN J GALLANT
JANICE MARLENE ORMEROD	(PCE)...PRO/PER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge re Wallace Minder and Andrea Ormerod

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

1. **Need** receipt from Andrea M. Ormerod, personal representative of the Estate of Janice M. Ormerod
2. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: CON PS1600142

CASE NAME: MTR OF BERNICE GRISSOM

HEARING:

Hearing Re: (amended) First and Final Accounting

COUNSEL:

LOYCE WILLIS (CPE)...LAW OFFICES OF EUGENE S. ALKAN
BERNICE GRISSOM (CEP)...CRAIG M PARKER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Amended First and Final Account and Report of Conservator, Petition to Dispense with Appraisal of Real Property and Stock Due to Death of Conservatee, and Petition for Fees and Distribution by Loyce Willis

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

1. Accounting period: Pre-death: 07/21/16 to 01/02/17
Post-death: 01/03/17 to 12/31/17
2. Assets on hand: \$465,455.78, consisting of \$19,672.40 in cash, \$430,000 in real property and remaining in stock.
3. Current bond: \$220,000, plus \$360,000 ordered to be held in blocked accounts with Comerica Bank and Community Bank.
4. Petitioner alleges she was unable to close conservatee's bank accounts with Letters of Conservatorship; however, utilized her Letters of Administration issued in Los Angeles County Superior to close said Comerica and Community Bank accounts.
 - a. Question why the combined \$360,000 in said bank accounts were not included in assets on hand? **Need** verified supplement.
 - b. **Need** Inventory and Appraisal regarding Comerica Bank, Community Bank, and current cash on hand. See next note regarding remaining assets.
5. Petitioner requests Court dispense with Inventory and Appraisal of *real property* and *stock* pursuant to Pr. C. §2633 due to death of conservatee prior to marshalling said assets; an Inventory and Appraisal has been filed

- with Los Angeles County Court in pending probate estate; and further alleges appraisal will cause unnecessary expenses of administration. **JTD**
6. **Need** bank/investment statements verifying date of beginning balance and final ending balance per Local Rule 20-908.
 7. Petitioner requests fees but does not specify amount. **Need** verified supplement including itemization of services.
 8. Attorney requests fees but does not specify amount. **Need** verified supplement with itemization of services.
 9. Schedule C Disbursements include expenses totaling \$11,121.61 for residential care facility, “other” expenses totaling \$2,884.92, and distribution to Mojester Burnley for \$100,000. [Acct, 2/27/18, LFpg16-17].
 - a. **Need** residential facility statements and/or written verification of rent per Pr.C. §2620(c)(4).
 - b. **Need** itemization and description of “other” expenses via verified supplement.
 - c. **Need** clarification regarding disbursement to Mojester Burnley as “surviving joint tenant.”
 10. **Need** notice of hearing and proof of service to Attorney Craig Parker.
 11. Petitioner requests Court exonerate bond upon filing of receipts and Ex Parte Petition for Final Discharge; however, bond may not be exonerated until entry of order for final discharge.
 12. No proposed order submitted.

RECOMMENDATION:

Need to clear notes #4-10 then Court’s discretion. If approved, court to set hearing on filing of receipts and final discharge for **04/24/19**.

(lh)

Future Hearing: 8/29/18 Accounting Review – **VACATE**

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

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

CASE#: CON PS1700423

CASE NAME: MTR OF JOAN LETTERLY

HEARING:

Petition for Appointment of Conservator

COUNSEL:

HAROLD LETTERLY (CEP)...FULLERTON LEMANN SCHAEFER & DO
JOAN LETTERLY (CEP)...BRYAN C HARTNELL

GENERAL INFORMATION

Continued from 12/15/17. Attorney Bryan Hartnell appointed for Joan Letterly. Notice given by Judicial Assistant.

Ex parte orders entered 01/08/18. Oral Report given by Bryan Hartnell. Harold Letterly appointed Temporary Conservator; \$519,200 bond.

Continued from 03/07/18 at request of Counsel to clear probate notes.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Harold Letterly, spouse

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

1. Petitioner seeks bond of \$1,489,440. Appears sufficient.
2. Petitioner seeks powers under Pr. C. §2591(c)(1) and (c)(2) to sell real property at public or private sale without Court confirmation, including personal residence, in the interest of proposed conservatee. JTD
3. Petitioner seeks medical powers, including exclusive authority to make medical decisions based on proposed conservatee's best interests and personal values pursuant to Pr. C. §2355(a). JTD **Capacity Declaration filed 04/02/18.**
4. Petitioner seeks dementia powers.
 - a. **Need** Dementia Attachment (form GC-313).
 - b. **Need** report of appointed Counsel Hartnell.
5. **Need** return of citation. **Appointed Counsel Bryan Hartnell appeared on 01/018/18. Does Court wish to waive Citation?**
6. **Report of Counsel Hartnell filed 03/05/18.**
7. Proof of Completion of the Conservatorship Training Class filed.
8. CI Report filed 12/13/17.

9. Petition lists proposed conservator, Harold Letterly (spouse), as the only relative within 2nd degree, and also in List of Required Contact Information.
10. ~Proposed Form Order: 11/14/17

RECOMMENDATION

Need to clear notes 3-5. If approved, set hearing for Compliance Review for **11/21/18** for the filing of the required documents and hearing re Accounting Review for **06/26/19**. Any accounting to be filed 30 days in advance.

(lh)

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

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

CASE#: CON PS1800011

CASE NAME: MTR OF CARL COMBS THOMAS

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CARRIE THOMAS	(CP)...PRO/PER
HOWARD THOMAS JR	(CP)...PRO/PER
CARL COMBS THOMAS	(CTP)...

GENERAL INFORMATION

Ex parte orders granted 01/19/18. Carrie Thomas and Howard Thomas, Jr appointed Temporary Conservators of the person only.

Continued from 02/28/18. Court clears probate notes on the record: Court notes that the Court is waiving the physician's initials and deems signatures to be dated the date of filing on 02/14/18. CI report was read and considered. Court notes the following: Court does not deem this petition to be for limited conservatorship; Court does not require appointment of Counsel; Court does not require a report from Inland Regional Center. Matter continued for petitioners to file proof of completion of conservatorship training class.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Carrie Thomas and Howard Thomas, Jr (parents)

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

1. Petitioner seeks medical powers. **Capacity Declaration filed 02/14/18.**
2. **CI Report filed 02/23/18.**
3. **IRC Report filed 04/10/18.**
4. **Need** Certificates of Completion of the Conservatorship Training Class.
5. Return of Citation filed 01/16/18.
6. Petition, item #1a does not list Howard Thomas Jr (father) as a proposed co-conservator; however, he signed the petition and it appears he seeks appointment as a co-conservator.
7. Petition, item #11 list of relatives does not include parents/petitioners. **JTD**
8. ~Proposed Form Order: 01/12/18

RECOMMENDATION

Need to clear note #4. If approved, set hearing for Compliance Review for **11/21/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5

(lh)

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

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

CASE#: CON PS1800083

CASE NAME: VICKI ANN EVINK

HEARING:
Petition for Appointment of Conservator

COUNSEL:
RICHARD H EVINK (PET)...PRO/PER
MARIA E EVINK (PET)...PRO/PER
VICKI ANN EVINK (CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Richard and Maria Evink, brother and sister in law

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

1. Proposed Conservatee's Civil rights not be limited without court order.
2. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract. **JTD**
3. Petitioner seeks medical powers. **Need** Capacity Declaration.
4. Proposed conservatee is developmentally disabled. **Need** report of appointed Counsel Walter Moore.
5. Proposed conservatee is developmentally disabled. **Need** IRC report.
6. **Need** list of required contacts (Local form SB-12224).
7. **Need** Certificate of Completion of the Conservatorship Training Class.
8. **Need** Notice of hearing and proof of service to include 30 days' notice to Inland Regional Center.
9. **Court Investigator report filed 04/09/18.**
10. Return of Citation filed 04/10/18.
11. ~Proposed Form Order: 03/15/18

RECOMMENDATION

Need to clear notes #3-8. If approved, set hearing for Compliance Review for **11/21/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: SC SS02302

CASE NAME: MTR RE JENNIFER JOANNE MCKINNEY

SEE ALSO 20 21

HEARING:

Hearing Re: OSC RE SANCTIONS ON ATTORNEY FOR 500.00

COUNSEL:

DAN G MCKINNEY (CPE)...REID & HELLYER
JENNIFER JOANNE MCKINNEY (CEP)...

THIS CASE IS SET FOR HEARING ON **OSC Re Sanctions and Surcharge for \$500/**
Accounting Review

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

1. Order dispensing with 6th account for period ending 12/31/17 sent to department for signature on 04/03/18.

RECOMMENDATION

Court's discretion re OSC.

(lh)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: SC SS02302

CASE NAME: MTR RE JENNIFER JOANNE MCKINNEY

SEE ALSO 19 21

HEARING:

Hearing Re: OSC RE SURCHARGE ON CONSERVATOR FOR 500.00

COUNSEL:

DAN G MCKINNEY

(CPE)...REID & HELLYER

JENNIFER JOANNE MCKINNEY

(CEP)...

See notes on prior matter #19.

(lh)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: SC SS02302

CASE NAME: MTR RE JENNIFER JOANNE MCKINNEY

SEE ALSO 19 20

HEARING:

Accounting Review

COUNSEL:

DAN G MCKINNEY

(CPE)...REID & HELLYER

JENNIFER JOANNE MCKINNEY

(CEP)...

See notes on prior matter #19.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **TRIAL**

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

CASE#: CON PS1500161

CASE NAME: MTR OF ELVIRA ALBURJAS

VACATED

HEARING:

Hearing Re: COURT TRIAL (THIRD DAY)

COUNSEL:

ROBERT DENNY

(CPE)...JAMES A HAGAN

MARIA YOLANDA DENNY

(CPE)...JAMES A HAGAN

ELVIRA ALBURJAS

(CEP)...MATTHEW E SHEASBY

BEATRIZ TRAVERSO

(OBJ/PET)...DAVID P COLELLA

Waiver of Court Fees and Costs filed by BEATRIZ TRAVERSO is GRANTED

Court trial—no notes—JTD

Future Hearings:

4/19/18 Court Trial (Day 4)

4/20/18 Court Trial (Day 5)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

PROBATE

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

CASE#: PRO DS1000295

CASE NAME: THE JACK A. JOHNSON TRUST

HEARING:

Petition to Approve Sixth Account and Report of WELLS FARGO BANK
and Petition for allowance of fees

COUNSEL:

WELLS FARGO BANK

(PET/TEE)...SCOTT GROSSMAN

THE JACK A. JOHNSON TRUST

(TRU)...

GENERAL INFORMATION

Continued from 02/28/18. No appearance. Attorney Grossman and client are to appear at next hearing.

THIS CASE IS SET FOR HEARING ON 6th Account Current and Petition for fees by Wells Fargo Bank, Trustee

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

1. Accounting period covers 07/01/15 to 06/30/17
2. Assets on hand **\$775,073.71** consisting of \$22,958.96 in cash and the balance in real property and securities.
3. Petitioner requests confirmation of fees taken in the amount of **\$26,010.85**. Periodic fees calculated on a tiered market rate. Calculated.[Acct,12/19/17, LFpg80-86]. **JTD**
4. Attorney requests fees of **\$1,225** billed at \$350/hour for 3.50 hours. Itemized [Acct, 12/19/17, LFpg88]. **JTD**].
5. Petitioner requests future accounts to be performed on a biennial cycle. **JTD**
6. Notice was given.
7. No proposed Order submitted. Submit after hearing.

RECOMMENDATION:

Court's discretion. If approved, Court may wish to set the next hearing re Accounting Review for **08/29/18 (if one year)** or **08/28/19 (if two years)**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

(lh)

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: JAMES MICHAEL WELCH

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

CASE#: PRO DS1000934

CASE NAME: TIMOTHY JOHN OWENS

HEARING:

Accounting Review re Public Administrator

COUNSEL:

JESSICA VANDENBURG (PET)...LAYNE A BARTHOLOMEW
TIMOTHY JOHN OWENS (DEC)...
SAN BERNARDINO CO. PUBLIC ADMIN (TA)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Public Administrator

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

1. Court appointed Public Administrator as Successor Administrator on 04/10/17 and ordered a Status Report to be filed by next hearing on 04/10/17. **Need** same.
2. **Need** accounting or status report.

RECOMMENDATION

Inquire status.

(lh)

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

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

CASE#: PRO PS0700214

CASE NAME: ** MF ** CINDA J RATLEY

HEARING:

Probate status report

COUNSEL:

CODY RATLEY (PET)...TIMOTHY G MISHLER
CINDA J RATLEY (DEC)...
CATRINA RATLEY (PET)...DIANE E ROBBINS
RALPH L RATLEY (PET)...ROBBINS & HOLDAWAY
ADVANCE INHERITANCE (TP)...JAMES L LEESTMA
BOND SERVICES OF CALIFORNIA
BURDETTE M GARVIN
LAW OFFICE OF MILES & HATCHER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Status Report of Catrina Ratley, Administrator

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

1. Estate is not in a condition to close as real property has not yet been sold. A reappraisal is pending completion with probate referee. Upon completion of reappraisal, petitioner will set a hearing for Confirmation of Sale to complete sale of real property.
2. Petitioner requests an additional 12 months to close the estate.
3. **Need** Notice of Hearing and proof of service as to Attorney Timothy Misher; Attorney Brian C. Miles, and include special notice to Advance Inheritance, Bond Services, and Burdette Garvin in accord with Pr.C. § 12201. Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. § 10950. **This form of notice is mandatory. Notice of Hearing filed 4/11/18 not in LF at time of review.**
4. ~Proposed Order 03/09/18

RECOMMENDATION:

Need to clear notes #3. If approved, set next hearing for Accounting Review for **05/15/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules. (lh)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1300718

CASE NAME: David Lee Patterson

VACATED

HEARING:

Hearing Re: Objection to a statement in the Notice of Ruling

COUNSEL:

DAVINA PATTERSON	(PET)...HEWELL LAW FIRM
DAVID LEE PATTERSON	(DEC)...
MERCEDES MURRAY	(PET)...MITCHELL I ROTH
MONICA MURRAY	(PET)...MITCHELL I ROTH
AUDELLA PATTERSON	(PET/PLA/APP/OBJ)...PRO/PER
ARROWHEAD CREDIT UNION	(PET)...KNAPP, PETERSEN & CLARKE
TRUST OF DAVID L PATTERSON	
DAVID EUGENE MURRAY	
GARY E MURRAY	

Waiver of Court Fees and Costs filed by AUDELLA PATTERSON is GRANTED

XREF: CIVRS1400249 *MERCEDES MURRAY -V- DAVINA MICHELLE PATTERSON*

No notes—JTD

Future Hearing: 6/14/18 Accounting Review

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

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

CASE#: PRO PS1300794

CASE NAME: Lawrence Alf

HEARING:

Hearing re Final Discharge

COUNSEL:

PATRICK O'HAIR (PET)...JOHN F WEBER
LAWRENCE ALF (DEC)...

GENERAL INFORMATION:

Continued from 12/19/17 and 02/06/18 at request of counsel.

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Approving First and Final Accounting entered 02/02/17.
2. No receipts. **Need** same.
3. **Need** Ex-parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb/lh)

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

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

CASE#: PRO PS1600156

CASE NAME: LILY MARTINEZ

HEARING:

First and Final Account and Report of ESTHER GUARDADO and
Petition for allowance of fees

COUNSEL:

ESTHER GUARDADO (PET)...FULLERTON LEMANN SCHAEFER & DO
LILY MARTINEZ (DEC)...
MARY MARIN (PET)...HARTNELL LAW GROUP
DEPT OF HEALTH CARE SERVICES (TP)...PRO/PER
INHERITANCE FUNDING COMPANY (PRO/PER)
CA VICTIM COMPENSATION BOARD (PRO/PER)
JOE MARTINEZ
DANIEL MARTINEZ

GENERAL INFORMATION:

Continued from 02/07/18. Pro Tem—no objections. Court ordered written objections to be filed by 03/09/18. If objections have not been filed they will be deemed waived.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Esther Guardado, administrator

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

1. Accounting period: 01/19/16 to 09/29/17
2. Assets on hand: \$170,733.84, cash
3. Petitioner requests statutory administrator and attorney's fees of **\$6,468.28** each. Calculated.
4. Attorney requests extraordinary fees totaling **\$15,597** related to sale of real property. Itemized [Acct, 11/14/17, LFpgs28-39]. **JTD**
5. Petitioner requests reimbursements totaling **\$18,413.04** for advanced costs as follows: \$15,149.84 to Esther Guardado; \$1,225.20 to Annie Silva; \$1,020 to Joe Martinez; and \$1,018 to Mary Marin. Itemized [Acct, 11/14/17, LFpgs25-26]. **JTD**

6. Declaration of California Victim Compensation Board filed 11/16/17 has claim of **\$2,166.02** re Daniel Mendez to be paid prior to his distribution.
7. Petitioner requests proposed distribution to Daniel Martinez be a 1/7th share of estate, **less \$4,842.50** for costs associated with attorney's fees for his eviction, costs of recovery of real/personal property, and \$425 to re-key decedent's van. However, it does not appear Daniel Martinez' distributive share will cover all requested costs. **Supp. 2/2/18 petitioner reduced requested reserve to \$1,500; reduced surcharge to \$2,401.85, vehicle (\$950 value) to be distributed to petitioner to cover surcharge.**
8. Proposed distribution provides for Daniel Martinez' distributive share to be reduced by \$8,900 per assignment filed 9/18/17.
9. There is a creditor's claim from Department of Health Care Services in the amount of **\$21,012.05. Supp. 2/2/18, claim will be paid prior to final distribution.**
10. Special Notice: Dept of Health Care Services; CA Victim Compensation Board; Inheritance Funding Company, Inc.
11. Petitioner requests reserve of **\$1,500**. Note: *if approved, need informal account for reserves per Local Rule 20-911 prior to filing ex parte petition for final discharge. JTD*
12. **Proof of Service of Supplement filed 2/13/18 does not include attached service list.**
13. **Objections by Mary Marin, Jose Martinez and Daniel Martinez filed 03/09/18.**
14. No revised proposed order submitted.

RECOMMENDATION:

Matter is contested.

Need to clear note #12. If approved, court to set hearing on filing of receipts and final discharge to include informal account re reserves for **04/24/19**.

(lh)

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

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

CASE#: PRO PS1600386

CASE NAME: MTR OF JACK J HALL

HEARING:

Accounting Review

COUNSEL:

JAYNEEN THORNTON (PET)...DIANA J CARLONI
JACK J HALL (DEC)...

GENERAL INFORMATION

Continued from 08/15/17 and 09/12/17 to file a status report.

Continued from 11/14/17. Counsel to file a partial #1 Inventory and Appraisal and an amended order showing limited powers.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Final Partial #2 Inventory and Appraisal filed 09/27/16 is not dated at signature of probate referee, and is missing printed name on page 2. Also, caption indicates Partial #2; however, Partial #1 was not previously filed. **Need** completed form.
2. No accounting or status report of administration. Need same.

RECOMMENDATION

Inquire status.

(lh/nb/lh)

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

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

CASE#: PRO PS1600466

CASE NAME: BEATRICE DORETTA CHISUM

HEARING:

Petition for waiver of final Account and Report of JEANNETTA
LORETTA LOVE and Petition for allowance of fees filed.

COUNSEL:

JEANNETTA LORETTA LOVE (PET)...MATTHEW SHEASBY
BEATRICE LORETTA CHISUM (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Waiver of Final Account and
Report and Petition for Fees by Jeannetta Lorretta Love, sole beneficiary

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

1. Assets on hand: \$368,229.79, consisting of cash, stock, and real property
2. Petitioner requests statutory fees of **\$12,046.89**.
3. Attorney requests statutory fees of \$12,046.89, less \$435.00 retainer fee
previously received for total of **\$11,611.89**. Calculated.
4. Attorney requests reimbursement for advanced costs in the amount of
\$926.44. Itemized. [Acct, 3/9/18, LFpg6].
5. Petitioner requests reimbursement of **\$1,038** for costs.
6. Petitioner requests reimbursement of **\$435** to third party, Jacqueline Love,
for advanced filing fee.
7. **Need** bank statement verifying date of death balances and final ending
balance per Local Rule 20-908.
8. ~Proposed order: 03/09/18

RECOMMENDATION:

Need to clear note #7 then Court's discretion. If approved, court to set hearing on filing
of receipts and final discharge for **04/24/19**.

(lh)

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

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

CASE#: PRO PS1700460

CASE NAME: JEFFREY RICHARD SMITH

HEARING:

First and Final Account and Report of MICHAEL D SMITH and
Petition for allowance of fees filed.

COUNSEL:

MICHAEL D SMITH	(PET)...VARNER & BRANDT
JEFFREY RICHARD SMITH	(DEC)...
JON A EYNON	(TP)...M DANIEL SAYLOR

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Report and
Petition for Fees and Final Distribution by Michael D Smith, administrator

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

1. Assets on hand: \$458,210.26, cash
2. Statutory fees of \$12,260.49, each, requested by petitioner and attorney. Calculated.
3. Petitioner alleges both heirs, Michael D Smith and Marcia Smith-Boll, entered into an agreement and assigned a portion of their share to Jon A. Eynon.
 - a. **Need** assignment of interest via verified supplement.
4. Petitioner requests reserve of \$1,000. **JTD**
5. Special Notice: Jon Eynon, c/o Attorney M. Daniel Saylor.
6. Notice is complete.
7. ~Proposed order: 02/28/18

RECOMMENDATION:

Need to clear note #3 then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **04/24/19**.

(lh)

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

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

CASE#: PRO PS1701285

CASE NAME: DRUSILLA SMITH MALLOY

HEARING:

Petition for (AMENDED) LETTERS OF ADMINISTRATION WITH FULL IAEA

COUNSEL:

WILLIAM ARNOLD MALLOY (PET)...PRO/PER
DRUSILLA SMITH MALLOY (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON **Amended [filed 03/16/18]** Petition for Letters of Administration with Full Authority under IAEA by William Malloy, spouse

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

1. Petitioner alleges all heirs waive bond; however, page 4 of petition is missing and it cannot be determined if all heirs have waived. Estimated value of estate is \$250,000 based on real property only. **Need verified supplement with page 4 of amended petition.**
2. **Need** Proof of Publication [re *amended* petition].
3. ~Proposed Form Order: 12/20/17

RECOMMENDATION

Need to clear notes #1-2. If approved, set Accounting/Status Review for **04/26/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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

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

CASE#: PRO PS1800214

CASE NAME: VIOLET LOUISE HAAS

HEARING:

Petition to determine succession to Real Property

COUNSEL:

JUANITA B. KING (PET)...JOHN F WEBER
VIOLET LOUISE HAAS (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Juanita B. King, sole beneficiary/executor

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

1. Petitioner, Juanita B. King, seeks 100% interest in decedent's 100% interest in real property per the will.
2. Notice is complete
3. ~Proposed Form Order: 03/06/18

RECOMMENDATION

Court's discretion.

(lh)

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

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

CASE#: PRO PS1800216

CASE NAME: CHARLES PALMER WHITE

HEARING:

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

COUNSEL:

HAZEL MARIE WHITE (PET)...VICTOR P SKVARNA
CHARLES PALMER WHITE (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Hazel White, spouse/nominee

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

1. All heirs waive bond. Estimated value of estate is \$227,000, personal property only. The court may for good cause require that a bond be given, either before or after issuance of letters per Prob. Code, § 8481(b). **JTD**
2. No proposed Order submitted.

RECOMMENDATION

RFA; Court's discretion re bond. If approved, set Accounting/Status Review for **06/26/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1701234

CASE NAME: The Miller Trust dated 05/27/1987, as amended, and

HEARING:

Petition for 1)REMOVE TRUSTEE 2)APPOINTMENT OF SUCCESSOR

COUNSEL:

ARIANNA A WAILANI
TRUDY LYNN
THE MILLER TRUST

(PET)...BEZAIRE LEDWITZ & ASSOCIATES,
(PET)...BEZAIRE LEDWITZ & ASSOCIATES,
(TRU)...

Currently under review by legal research.

(LR)

NOTICE:

Need notice of hearing and proof of service as to Chere A. Miller (surviving settlor);
Germaine C. Miller, successor trustee; Mark T. Mauerman per Pr. C. §17203.

(lh)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

CONSERVATORSHIPS

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

CASE#: CON PS1700160

CASE NAME: JAIME AVALOS JR

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ELIZABETH GARCIA

COUNSEL:

ELIZABETH GARCIA

(CP)...PRO/PER

JAIME AVALOS JR

(CTP)...JEANNE E KENNEDY

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Elizabeth Garcia (mother) was appointed Limited Conservator of the person on 09/13/17.
2. Notification of Conservatee's Rights was filed.
3. Determination of Conservatee's Appropriate Level of Care was filed
4. Care Plan was filed.

RECOMMENDATION

None.

(lh)

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

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

CASE#: CON PS1700304

CASE NAME: ROBIN LEE BARKSDALE

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of CAROLYN JOYCE BARKSDALE

COUNSEL:

CAROLYN JOYCE BARKSDALE	(CP)...CHRISTOPHER A POULOS
ROBIN LEE BARKSDALE	(CTP)...DONNASUE ORTIZ
JEFFREY MITCHELL BARKSDALE	(CP)...
JOSEPH RANDALL BARKSDALE	(CP)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Jeffrey Mitchell and Joseph Barksdale were appointed Limited Co-Conservators of the person on 09/13/17.
2. Notification of Conservatee's rights filed 09/25/17. Proof of Service, item #5 indicates a copy of Order dated 09/18/17 was served; however, Order was not filed until 9/13/17. Court to inquire if proper Order was served.
3. **Need** a Determination of Conservatee's Appropriate Level of Care per Pr.C.§ 2352.5 (form GC-355).
4. **Need** Care Plan in accord with Pr. C. §2352.5.

RECOMMENDATION

Inquire status.

(lh)

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

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

CASE#: CON PS1800060

CASE NAME: MTR OF JAMES ANDREW SILVESTRE

HEARING:
Petition for Appointment of Conservator

COUNSEL:

JESUS A SILVESTRE (CP)...PRO/PER
ROSALIE SILVESTRE (CP)...PRO/PER
JAMES ANDREW SILVESTRE (CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Jesus A. Silvestre to appoint Jesus and Rosalie Silvestre, parents

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

1. Petitioner alleges proposed conservatee is developmentally disabled. Does Court wish to deem petition as a petition for limited conservatorship? **JTD**
 - a. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, Court may wish to appoint counsel and require report for proposed conservatee per Pr.C. §1470. **JTD**
 - b. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship an IRC report is therefore optional per Pr. C. § 1827.5(b). **JTD**
2. Petitioner seeks medical powers. Capacity Declaration is missing physician's initials at item #7b. **JTD**
3. **CI Report filed 04/10/18.**
4. Notice is complete.
5. Proof of Completion of the Conservatorship Training Class filed.
6. Return of Citation filed 03/19/18.
7. ~Proposed Form Order: 02/26/18

RECOMMENDATION

Court's discretion. If approved, set hearing for Compliance Review for **11/21/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5

(lh)

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

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

CASE#: RC RS00395

CASE NAME: MYLES SCOTT TWEEDY

HEARING:

Petition for attorney fees for approved petition and order for
appointment of probate co-conservator

COUNSEL:

KAREN J HANFORD	(CPE/CP)...BUXBAUM & CHAKMAK
KENT T TWEEDY	(PCR/CPE)...BUXBAUM & CHAKMAK
MYLES SCOTT TWEEDY	(PCE/CEP/CTP)...MITCHELL I ROTH
EMILY BEIN	(CP)...BUXBAUM & CHAKMAK

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by John P. Howland,
attorney for conservator

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

1. Petitioner, John P. Howland, attorney for conservator, Karen J. Hanford requests fees of **\$6,215** for 18.50 hours at \$330/hour for attorney services. Itemized. [Petition, 03/08/18, LFpg5-6]. **JTD**
2. **Need** Notice of Hearing and Proof of Service to Attorney Mitchell Roth and Myles Scott Tweedy. **Notice filed 4/12/18 not in LF at time of review.**
3. No proposed Order submitted.

RECOMMENDATION

Need notice of hearing and proof of service.

(lh)

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

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

CASE#: SC SS03045

CASE NAME: MTR OF GABRIEL HERNANDEZ

HEARING:

Sixth Account and Report of MARIA HERNANDEZ and Petition for allowance of fees filed.

COUNSEL:

DANNY HERNANDEZ	(CP/CPE)...THOMAS W DOMINICK
MARIA HERNANDEZ	(CP/CPE/TEE)...THOMAS W DOMINICK
GABRIEL HERNANDEZ	(CTP/CEP)...ROBERT S WORLEY

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Sixth Account of SNT and Petition for Allowance of Fees by Maria Hernandez

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

1. Accounting covers 01/01/16 to 12/31/17
2. Assets on hand: **\$31,649.33**, cash
3. Petitioner does not seek compensation.
4. Attorney requests fees of **\$1,755.50**. Billed at the discounted rates of \$310/hour for 4.45 hours attorney time and \$110/hour for 1.8 hours paralegal time. Itemized [LF, pgs. 20-21]. JTD.
5. Attorney requests reimbursement of **\$465** for costs advanced. Itemized.
6. Current bond of \$85,268.33. Appears adequate.
7. Notice given, no objections.
8. ~Proposed Order 03/8/18

RECOMMENDATION:

RFA, subject to Court's discretion re fees. If approved, set hearing on the next accounting review for **03/27/19** (if one year) or **03/26/20** (if two years). Accounting to be filed 30 days in advance.

(lh)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIP

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

CASE#: CON PS1600023

CASE NAME: MTR OF BETTY J ELLIS

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ASIRRA ELLIS-SUGUITAN

COUNSEL:

ASIRRA ELLIS-SUGUITAN

(CPE)...SHENIECE J SMITH

BETTY J ELLIS

(CPE)...WALTER T. MOORE

GENERAL INFORMATION

Continued from 02/07/18 and 02/14/18 for Counsel and Conservator to be present.

THIS CASE IS SET FOR HEARING ON Compliance Review/Accounting Review

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

1. Asirra Ellis-Suguitan, daughter, was appointed Conservator of the person and estate on 08/31/17, \$60,000 bond.
2. Determination of Conservatee's Appropriate Level of Care per Pr.C. §2352.5 (form GC-355) filed 01/19/18.
3. **Need** Notification of Conservatee's rights per Pr. C. §1830(c).
4. **Need** Care Plan in accord with Pr. C. §2352.5.
5. **Need** final Inventory and Appraisal per Pr. C. §2610.
6. **Need** proof of service Inventory and Appraisal including Instructions for Objections per Pr. C. §2610.
7. (If real property is owned) Need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr. C. §2323.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

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

CASE#: PRO PS1300677

CASE NAME: WILFRIED JOHANN KREIDL

HEARING:

PETITION FOR FINAL DISTRIBUTION ON WAIVER OF Account and Report
of ALEXANDER WILLIAM KREIDL and Petition for allowance of fees filed.

COUNSEL:

ALEXANDER WILLIAM KREIDL (PET)...PRO/PER

WILFRIED JOHANN KREIDL (DEC)...

WILLIAM ALEXANDER KREIDL (PET)...PRO/PER

GENERAL INFORMATION:

Continued from **05/17/16 and 08/02/16** (no appearance). Citation issues as to
Alexander W. Kreidl who is cited and required to appear.

Continued from **10/04/16 and 12/20/16** to clear notes. Court recommends petitioner to
seek legal advice.

Continued from 04/11/17 due to no appearance. Alexander William Kreidl ordered to
be present at next hearing. Notice by Judicial Assistant.

Continued from **05/30/17**. No appearance. Continued for petitioner to be present.

Continued from 06/21/17. Supplement to be filed by 08/23/17. Nothing new filed.

Continued from 09/27/17. No appearance. Alexander William Kreidl ordered to be
present at next hearing. Notice given by Judicial Assistant.

Continued from 11/22/17. Last opportunity to clear probate notes before Public
Administrator is appointed.

**Continued from 02/07/18. No appearance at request of Court. Alexander William
Kreidl ordered present at next hearing.**

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of
Account and for Fees.

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

1. Purported account, consisting of 3 pages, filed 03/19/16, includes waiver of
account by sole heir [LF, p4]. However, notwithstanding said waiver, petitioner
must file a final report of administration per Pr. C. § 1064 and Pr. C., §
10954(c)(1). **Need** amended 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.

2. Petitioner does not request compensation.
3. **Need** statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary (Pr. C. § 1064 (a)(4)). File verified supplement.
4. **Need** statement as to whether cash has been invested and maintained in an interest bearing account? Pr.C.§ 1064(a)(5).
5. Was a diligent search conducted to determine known or reasonably ascertainable creditors? Were any creditor's claims actually filed? If so, by whom, what was the amount of the claim, what was paid on the claim?
6. **Need** statement regarding notice to Director of Health Care Services. Alternatively, notice per Pr. C. § 9202(a).
7. **Need** statement regarding notice to California Victim and Compensation and Government Claims Board. Alternatively, notice per Pr. C. § 9202(b).
8. **Need** statement regarding notice to Franchise Tax Board. Alternatively, notice per Pr. C. § 9202(c)(1).
9. **Need** description of assets on hand per Local Rule 20-906.
10. **Need** manner of distribution per Local Rule 20-907.
11. **Need** bank/financial statements to support date of death and closing balances per Local Rule 20-908.
12. **Need** return of citation.
13. **Amended petition for final distribution and supporting documents were returned by Court on 01/03/18 for improper legal format.**
14. Status report filed and set for 06/21/17.

RECOMMENDATION

Need amended account. Court to continue matter to a Monday or Tuesday as originally set. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.

(nb/lh/lc/lh)

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

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

CASE#: PRO PS1400768

CASE NAME: (MF)ANTONIA LUNA REVOCABLE TRUST DATE 9/8/09

HEARING:

Hearing Re: REQUEST TO RELEASE FUNDS & FINALIZE THE MATTER

COUNSEL:

LUIS ESTRADA	(PET)...PRO/PER
ANTONIA LUNA REVOCABLE TRUST	(TRU)...
VICTOR M HERNANDEZ	(PLA)...WILLIAM M GARRETT, JR
OFELIA PARAMO	(PLA)...WILLIAM M GARRETT, JR
VICTOR HERNANDEZ	(OBJ)...BANKS GARCIA & JANIS
LOUIS HERNANDEZ	
ALL UNKNOWN OCCUPANTS	

CCP170.6 filed as to Judge CYNTHIA LUDVIGSEN

GENERAL INFORMATION:

Continued from **11/21/17**.

Continued from 02/07/18. Court finds current objections filed were untimely as they were filed after the 180-day cut-off. Court orders proof, receipts filed under penalty of perjury that monies requested to be reimbursed were paid. Parties advised that if they have been living in the Trust's real property, rent would need to be paid. Rent may be taken out of proceeds to which they are entitled. Court ordered a breakdown of work done for Trust to be filed by 03/29/18 in order for Court to consider ordering trustee fees. Declaration to be filed under penalty of perjury. Court requested Mr. Garcia file his attorney fee bill with the Court.

THIS CASE IS SET FOR HEARING ON Request to Release Funds & Finalize Matter

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

1. Matte set at Ex Parte Hearing held on 10/17/17 hearing, wherein, petition was denied with the exception of the request for reimbursement of the costs to obtain the permits and work done to the residence as long as the petitioner provides counsel with valid proof of permits and receipts for the work done on the residence. Court will allow legitimate written objections by counsel if necessary.

2. Declaration by Stephen Plaistied, electrician hired to complete necessary electrical repairs filed 11/17/17.
3. **Declaration in support of trustee fees and reimbursement filed 3/29/18. Reimbursements are itemized at LFpg7-51. JTD**
4. **Declaration of attorney services of Damian Garcia filed 3/29/18 requesting \$25,169. Need verified supplement with itemization of services.**

RECOMMENDATION:

Inquire status of attorney invoice.

(nb/lh)

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

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

CASE#: PRO PS1500028

CASE NAME: ANGELA GAIL MATTHEWS

HEARING:

Accounting Review

COUNSEL:

CHRISTOPHER K MATTHEWS (PET)...JOHN M WOODBURN
ANGELA GAIL MATTHEWS (DEC)...

GENERAL INFORMATION

Continued from **5/3/16** Court is informed that the Civil Case has been settled and a Minor's Compromise case filed.

Continued from **08/15/16, 10/26/16, 01/04/17, 03/15/17** and **05/24/17**. Waiver to be filed.

Continued from 07/26/17 Christopher Matthews and/or Counsel is ordered to appear if accounting or status report not filed with the court.

Continued from 09/20/17 at request of Counsel to file accounting.

Continued from 11/22/17 to file an accounting.

Continued from 02/07/18 for accounting to be filed by 03/19/18. This will be the last continuance prior to suspending administrator and appointing Public Administrator.

THIS CASE IS SET FOR HEARING ON Accounting/Status Review

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

1. Letters of Administration with Limited IAEA issued to Christopher Matthews, spouse on 3/10/15, \$20,000 bond.
2. **Need** an accounting or status report.

RECOMMENDATION:

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

(sa/lc/ww/lc/lh)

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

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

CASE#: PRO PS1501059

CASE NAME: MTR OF BILLIE V JARVIS

HEARING:

First report of Special Administrator w/waiver of Account and
Report of CHRISTIE DAVIDSON and Petition for allowance of fees filed.

COUNSEL:

PETER VAN BUSKIRK (PET)...PRO/PER
BILLIE V JARVIS (DEC)...
CHRISTIE DAVIDSON (SPA/PET/TEE)... HORSPOOL & HORSPOOL
KELLY ANN JARVIS BUTLER (JOHN W SHORT)

XREF: CIVDS1611522 VAN BUSKIRK-V-CHRISTIE DAVIDSON

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Waiver of Account and First and Final Report
and Petition for Fees by Special Administrator, Christie Davidson

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

1. Estate had no assets to administer.
2. Attorney requests extraordinary fees totaling **\$8,155** for 23.30 hours at \$350/hour for attorney services related issues with truck, house and trial preparation to be paid from the Bille V. Jarvis Trust. Itemized [Acct, 2/8/18, LFpgs9-10]. **JTD**
3. There are (3) creditors' claims: *Capital One* for \$322.10; *Ascension Point* for \$9,153.05; and *Bank of America* for \$2,009.36; however, the estate is insolvent and no claims have been paid. All claims will be paid from the Trust.
4. ~Proposed order: 02/08/18

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **04/24/19**.

(lh)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1600025

CASE NAME: MTR LOREN L KIRK

SEE ALSO 7, 8, 9

HEARING:

Hearing Re: COMPLAINT FOR FRAUD, MISREPRESENTATION, ETC

COUNSEL:

DANIEL BROWN	(PET)...LURIE, ZEPED A, SCHMALZ, HOGAN
LOREN L KIRK	(DEC)...
DENNIS SHOGREN	(PET)...E JOAN NELMS
WILLIAM N CARTER	(PET/OBJ)...EMISON HULLVERSON LLP
JOAN CUNNINGHAM	(PET)...EMISON HULLVERSON LLP
CAROL MARSHALL	(PET)...EMISON HULLVERSON LLP
BARBARA SAGEHORN	(EMISON HULLVERSON LLP)
RAYMOND J LOPEZ	

CCP170.6 filed as to Judge CYNTHIA LUDVIGSEN

Currently under review by Legal Research.

(LR)

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

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

CASE#: PRO PS1600025

CASE NAME: MTR LOREN L KIRK

SEE ALSO 6, 8, 9

HEARING:

Hearing Re: PETITION FOR LETTERS OF ADMIN W/FULL IAEA

COUNSEL:

DANIEL BROWN	(PET)...LURIE, ZEPED A, SCHMALZ, HOGAN
LOREN L KIRK	(DEC)...
DENNIS SHOGREN	(PET)...E JOAN NELMS
WILLIAM N CARTER	(PET/OBJ)...EMISON HULLVERSON LLP
JOAN CUNNINGHAM	(PET)...EMISON HULLVERSON LLP
CAROL MARSHALL	(PET)...EMISON HULLVERSON LLP
BARBARA SAGEHORN	(EMISON HULLVERSON LLP)
RAYMOND J LOPEZ	

CCP170.6 filed as to Judge CYNTHIA LUDVIGSEN

GENERAL INFORMATION:

Continued from **03/01/16**. Attorney Mark Bridges states that he will be filing a will contest. Attorney David Philipson can file an ex parte for letters of special administration to address the issue with the red tagged property & funds that are not able to be deposited w/o letters.

Continued from **05/03/16**. Dennis Shogren appointed special administrator, \$4,000,000 bond.

Continued from **05/19/16, 06/30/16, 09/15/16, 01/10/17 and 05/04/17**. Counsel reported private mediation will be heard in late July or August. Counsel Church to lodge a copy of report with court. Judge Reilly will inform parties where they will be assigned and when their trial readiness hearing will be heard.

Continued from 08/03/17. Matter assigned for a long-cause trial to S26 with Judge **Cohn. Counsel reported that standing is an issue. Trial readiness taken off calendar pending next hearing.**

Continued from **10/26/17** at request of counsel.

Hearing on 02/13/18 was vacated and reset for 04/18/18 pursuant to Stipulation and Order filed 01/30/18.

THIS CASE IS SET FOR HEARING ON

- Petition 1- for Letters Testamentary with full authority under IAEA by named executor, Daniel Brown.
- Petition 2- for Letters of Administration with full authority under IAEA by Dennis Shogren CPA.

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

Petitioner 1 Daniel Brown, executor

1. Petitioner requests \$43,200,000.00 bond be posted. Appears adequate.
2. Proof of Subscribing Witness filed 02/23/16.
3. **Need** Notice of Petition to Administer Estate with proof of service.
4. Lengthy Declaration filed by petitioner on 03/13/17 indicating personal property held. It appears that remaining items are minimal, keys, laptop, 2 motorcycles in disrepair and pennies.
5. **Objections filed by William Carter, Joan Cunningham and Carol Marshall on 02/26/16. Objections and will contest also filed by same parties on 05/03/16. Proof of summons filed 06/29/16 per Pr.C. § 8250.**
6. **First amended Contest and Grounds of Objection to Probate filed 11/10/16 by William N. Carter, Joan Cunningham and Carol Marshall. Proof of service filed 11/10/16. However, need proof of summons of amended Contest per Pr. C. § 8250.**
7. **Reply and Objections to First Amended Contest filed 01/03/17 by Daniel Brown.**
8. **Supp with joinder filed 07/20/17. Barbara Sagehorn, paternal aunt of decedent joins in petition for probate and does not object. Court to clarify if Barbara is merely approving petition by Daniel or is seeking to be co-administrator.**
9. ~Proposed Form Order/Letters 01/11/16.

Petitioner 2 Dennis Shogren, CPA

10. Petitioner requests bond of \$1,000,000. Estate is valued at \$43,200,000.
11. Petitioner attaches will; however, is not probating the will.
12. Petitioner is nominee by cousins; the only heirs at law William Carter, Joan Cunningham and Carol Marshall.
13. List of firearms filed on 05/23/17.
14. ~Proposed Form Order: 05/4/16.

RECOMMENDATION:

Matter is contested, need to clear note 3 & 6. Petitioner 1 appears to have higher priority. If approved, set future hearing for Accounting/Status Review on **06/26/19**. Any account to be filed 30 days in advance. Note requirements of Local Rules. (nb/lc/nb/lc/nb/lh)

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

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

CASE#: PRO PS1600025

CASE NAME: MTR LOREN L KIRK

SEE ALSO 6, 7, 9

HEARING:

Hearing Re: PTN FOR PROBATE OF WILL/LETTERS W/FULL IAEA

COUNSEL:

DANIEL BROWN	(PET)...LURIE, ZEPED A, SCHMALZ, HOGAN
LOREN L KIRK	(DEC)...
DENNIS SHOGREN	(PET)...E JOAN NELMS
WILLIAM N CARTER	(PET/OBJ)...EMISON HULLVERSON LLP
JOAN CUNNINGHMAN	(PET)...EMISON HULLVERSON LLP
CAROL MARSHALL	(PET)...EMISON HULLVERSON LLP
BARBARA SAGEHORN	(EMISON HULLVERSON LLP)
RAYMOND J LOPEZ	

CCP170.6 filed as to Judge CYNTHIA LUDVIGSEN

See notes on prior matter #7.

(lh)

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

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

CASE#: PRO PS1600025

CASE NAME: MTR LOREN L KIRK

SEE ALSO 6, 7, 8

HEARING:

Motion Re: ORDER IMPOSING TERMINATING SANCTIONS

COUNSEL:

DANIEL BROWN	(PET)...LURIE, ZEPED A, SCHMALZ, HOGAN
LOREN L KIRK	(DEC)...
DENNIS SHOGREN	(PET)...E JOAN NELMS
WILLIAM N CARTER	(PET/OBJ)...EMISON HULLVERSON LLP
JOAN CUNNINGHMAN	(PET)...EMISON HULLVERSON LLP
CAROL MARSHALL	(PET)...EMISON HULLVERSON LLP
BARBARA SAGEHORN	(EMISON HULLVERSON LLP)
RAYMOND J LOPEZ	

CCP170.6 filed as to Judge CYNTHIA LUDVIGSEN

Currently under review by Legal Research.
(LR)

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

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

CASE#: PRO PS1600997

CASE NAME: MTR OF MARY PAULINE LYNN

HEARING:

FIRST AND FINAL Account and Report of CAROLINE ANN SORIANO and
Petition for allowance of fees filed.

COUNSEL:

CAROLINE ANN SORIANO (PET)...NEIL J DE LEON
MARY PAULINE LYNN (DEC)...

GENERAL INFORMATION:

Continued from 02/07/18 at request of Counsel for completed accounting to be filed. Court requested facts regarding distribution be provided to the Court.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Caroline Ann Soriano, administrator

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

1. Assets on hand: \$23,396.73
2. Statutory fees of \$7,240 requested, each, for administrator and attorney fees. Calculated. **JTD**
3. Attorney requests extraordinary fees for sale of real property totaling \$2,761.25 for 9.9 hours at \$350/hour. Itemized. [Acct, 10/06/17, LFpgs16-19]. **JTD**
4. Attorney requests reimbursement for advanced costs in the amount of \$549. Itemized. [Acct, 10/06/17, LFpg8]. **JTD**
5. Disbursements include unauthorized preliminary distributions totaling \$90,000 [\$30,000 each] to Caroline Ann Soriano, Sandra Kay Lynn, and Pamela Munoz, paid out on 05/05/17. **Need** verified supplement with facts regarding distribution per m/o dated 02/07/18. **Supp filed 4/11/18 beneficiaries Caroline and Sandra were made for relocation expenses. Both beneficiaries had prior evictions and poor credit and needed advanced funds to secure homes. Pamela Munoz was given her share in an effort to equalize distribution. JTD**

6. There are two creditor's claims from Ascension Point Recovery Services in the amount of \$708.81 and \$1,241.90 filed 01/17/17. Petitioner filed rejection of said claims on 05/01/17.
7. Notice was given.
8. **Petitioner requests \$4,000 reserve.** Note: *if approved, Administrator will need to provide an informal account regarding reserve prior to filing a petition for final discharge per Local Rule 20-911. JTD*
9. No proposed order submitted.

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing of receipts and final discharge to include informal account re reserves for **04/24/19**.

(lh)

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

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

CASE#: PRO PS1601177

CASE NAME: JULIANNE K. WARN

HEARING:

Probate status report filed.

COUNSEL:

LINDA MAXWELL (PET)...ROBBINS & HOLDAWAY
JULIANNE K. WARN (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Status Report of Linda Maxwell, Administrator

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

1. Estate is not in a condition to close due to recent liquidation of US savings bonds, and additional time needed to prepare accounting and report.
2. Petitioner requests an additional 6 months to close the estate.
3. Notice is complete.
4. ~Proposed Order: 02/28/18

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review for **10/24/18**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(lh)

Superior Court of Calif, County of San Bernardino
Page: 12
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

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

CASE#: PRO PS1701268

CASE NAME: ESTATE OF NED LELAND COYL

HEARING:

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

COUNSEL:

JOY L COYL (PET)...ELDER LAW CENTER
NED LELAND COYL (DEC)...

GENERAL INFORMATION:

Continued from 01/31/18 at request of Counsel to clear probate notes.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Joy L Coyl (spouse)

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

1. Petitioner alleges all heirs waive bond; however, **bond waivers are missing from issue: Ned Coyl, Jr; Starla Coyl, Tamara Coyl, and Scott Coryl.** Estimated net value of estate is \$150,000. The court may for good cause require that a bond be given. (Prob. Code, § 8481(b)). JTD
2. ~Proposed form Order: 12/18/17

RECOMMENDATION:

RFA; Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **06/26/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

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

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

CASE#: PRO PS1800247

CASE NAME: MTR OF DORENE J COX

HEARING:

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

COUNSEL:

DAVID L COX (PET)...DAVID M GROSSMAN
DORENE J COX (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by David L. Cox, son

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

1. Petitioner requests bond of \$350,000. Appears sufficient.
2. ~Proposed Form Order: 03/14/18

RECOMMENDATION

RFA, If approved, set Accounting/Status Review for **06/26/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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

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

CASE#: RPR RS02969

CASE NAME: LANA DAWN BERGMAN

HEARING:

Hearing re Final Discharge

COUNSEL:

ROBERT CARSTENS	(PET)...GREGORY T ANNIGIAN
LANA DAWN BERGMAN	(DEC)...
GREGORY T ANNIGIAN ESQ	(PET)...GREGORY T ANNIGIAN
PNC BANK	(RES)...SEVERSON & WERSON
METROPOLITAN LIFE INSURANCE	(SEVERSON & WERSON)
MICHAEL B FIERSTEIN	(SHARON L GRIER)
LORRAINE C FIERSTEIN	(SHARON L GRIER)

GENERAL INFORMATION

Continued from 10/19/16 and 03/15/17. Waiting for insurance policy payment.
Continued from 06/21/17. Counsel is attempting to locate Chelsea Bergman. They report her juvenile case was transferred from San Bernardino County to Orange County. Court offers to call different court to attempt to track minor through that case.
Continued from 12/20/17 at request of Counsel to clear notes. Court will require a guardianship of minor to be filed. Petition may be filed in San Bernardino as the probate is filed here.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Gregory Annigian approved on 10/14/15.
2. **Need** proof of guardianship.
3. **Need** receipts for Shayna Bergman and Guardian of Chelsea Bergman.
4. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status of receipts and order.

(lc/lh)

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

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

CASE#: PRO PS1700689

CASE NAME: MTR OF YSB-61325 IRREVOCABLE TRUST

SEE ALSO 16, 17, 18

HEARING:

Hearing Re: Status re ATTORNEY FEES

COUNSEL:

MILDRED KANTER (PET)...FRIDLEY LAW FIRM
YSB-61325 IRREVOCABLE TRUST (TRU)...
DENISE KANTER (OBJ)...DOUGLAS J PETTIBONE

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Status Hearing re Request for Attorney Fees

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

1. Matter set on 03/12/18, wherein, Court denied Motion to Compel Deposition of Petitioner Milder Kanter; however, Court indicated it would consider granting reasonable attorney's fees for Mildred's Counsel needing to address this motion.
2. Attorney Declaration by Mildred Kanter filed 03/21/18 seeks monetary sanctions against Denise Kanter totaling **\$3,657.50** for 11.1 hours at \$325/hour in attorney fees to draft response to a premature motion to compel filed by Denise Kanter. Itemized at LFpg3-4. **JTD**
3. ~Proposed Order: 3/21/18

RECOMMENDATION

Court's discretion.

(lh)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1700689

CASE NAME: MTR OF YSB-61325 IRREVOCABLE TRUST

SEE ALSO 15, 17, 18

HEARING:

Petition for ORDER SETTING ASIDE REAL PROPERTY CONVEYANCE

COUNSEL:

MILDRED KANTER (PET)...FRIDLEY LAW FIRM
YSB-61325 IRREVOCABLE TRUST (TRU)...
DENISE KANTER (OBJ)...DOUGLAS J PETTIBONE

Currently under review by legal research.

(LR)

Notice is complete.

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

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

CASE#: PRO PS1700689

SEE ALSO 15, 16, 18

CASE NAME: MTR OF YSB-61325 IRREVOCABLE TRUST

HEARING:

Probate status report

COUNSEL:

MILDRED KANTER (PET)...FRIDLEY LAW FIRM
YSB-61325 IRREVOCABLE TRUST (TRU)...
DENISE KANTER (OBJ)...DOUGLAS J PETTIBONE

GENERAL INFORMATION

Matter set on 12/14/17 at Petition of Order Setting Aside Real Property. Hearing was continued by Court to trail Motion to Compel set for 3/12/18. Objections were filed. Court made orders that property in dispute may not be sold, leased, etc. Court ordered Status Reports to be filed prior to 03/12/18 with notice waived.

On 3/12/18, Court denied Motion to Compel Deposition finding Mildred Kanter never failed to appear at deposition. Court ordered deposition to be arranged and recommended deposition to take place at Mildred's home. Court notes there was no good faith to meet and confer. Court will consider reasonable attorney's fees for Mildred's counsel in response to motion. Attorney fee declaration to be filed.

THIS CASE IS SET FOR HEARING ON

- Status Report re Denise Kanter filed 2/27/18
- Status Report re Mildred Kanter filed 3/5/18

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

Status Report re Denise Kanter filed 2/27/18

1. Respondent Denise Kanter alleges Mildred Kanter has not produced documents in response to discovery and failed to appear at deposition.
2. Respondent Denise Kanter seeks expedited trial date and contemplated filing motion per CCP §36 due to Mildred Kanter's age and health.
3. Respondent alleges Gary Kanter is letting property fall into state of disrepair and that there are several safety issues, e.g. fallen fence, missing pad lock to pool, and green pool water. Respondent further alleges she must sell property but cannot due to a Lis Pendens recorded on property which must first be resolved.

4. Respondent Denise Kanter does not believe parties can reach a favorable settlement due to ongoing animosity.

Status Report re Mildred Kanter filed 3/5/18

5. Mildred alleges she intends to issue a deposition notice upon after hearing on motion to compel Mildred's deposition.
6. Mildred intends to serve form interrogatories, special interrogatories, a request for production of documents, and requests for admissions within 60 days.
7. Mildred contends there are related cases which may affect the outcome of this matter, including the Kanter Irrevocable Trust, Riverside case # INP1700490 and Kanter v Kanter, FAMSS1507285. As such, Mildred suggests these matters be set on a normal calendar.
8. Mildred alleges she remains open to settlement and encourages mediation or mandatory settlement conference.
9. Mildred alleges the subject property remains unencumbered; taxes and insurance are current.
10. In response to Denise's Status Report, Mildred alleges repairs have been made to the fallen fence at Mildred's expense. The pool is regularly cleaned, but it requires a new filter which has not been replaced due to its high cost and the lack of access to trust funds. However, the water itself is not a health issue. Mildred welcomes Denise to replace the filter, if desired.

RECOMMENDATION

Court's discretion.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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

CASE#: PRO PS1700689

CASE NAME: MTR OF YSB-61325 IRREVOCABLE TRUST

SEE ALSO 15, 16, 17

HEARING:

Probate status report

COUNSEL:

MILDRED KANTER

(PET)...FRIDLEY LAW FIRM

YSB-61325 IRREVOCABLE TRUST (TRU)...

DENISE KANTER

(OBJ)...DOUGLAS J PETTIBONE

See prior matter #17

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

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

CASE#: CON DS1000075

CASE NAME: KENNETH WAYNE NEWTON

SEE ALSO 20, 21

HEARING:

Petition for To be Removed as Co-Signer on the Bond and
Co-Conservator etc

COUNSEL:

KATHRYN NEWTON	(CPE)...PRO/PER
DEBORAH COOKSEY	(CPE)...PRO/PER
GLORIA ROMAN	(CEP)...GEORGE F DICKERMAN
PUBLIC GUARDIAN	(CEP)...RALPH K HEKMAN
KENDRA NEWTON-FRANCISCO	(CPE/CP)...EDWARD B FISCHER & ASSOC
JULY CURD	(CPE)...EDWARD B FISCHER & ASSOC
EDWARD B FISCHER	(PET)...
DONALD NEWTON	(CPE)...PRO/PER
DAVID BRIAN NEWTON	(CPE/CE)...EDWARD B FISCHER & ASSOC
LYNDA ROYSTER	(CPE)...HARRY J HISTEN
BONZA-RHEE MURRAY	(CPE)...PRO/PER
CLAUDETTE SMITH	(CPE)...PRO/PER
WOODROW NEWTON	(PET)...MILES & HATCHER
PEGGY WALLACE-NEWTON	(PET)...MILES & HATCHER
LYNDA ROYSTER	(CPE)...HORSPPOOL & PARKER
KENNETH WAYNE NEWTON	(CEP/CTE/CEE)...WALTER T. MOORE
MAZIO D ROYSTER	(CPE)...HORSPPOOL & H ORSPOOL
E JOAN NELMS	(PET)...MARK J. FLORY
ETHEL L NEWTON	(PET/CE)...PRO/PER
AMERICAN CONTRACTORS INDEMNITY (CRAIG P BRONSTEIN)	
BOND SERVICES OF CALIFORNIA (PRO/PER)	
US SPECIALTY INSURANCE	(LANAK & HANNA)

GENERAL INFORMATION:

Ethel Newton added as a co-conservator of the estate on 09/18/13, \$105,600.00 bond.

Continued from 02/20/18. Court agrees with Ms. Stevenson that removing party from the bond is a contract issue and Court has no authority to remove an indemnitor from the bond. Court will not remove co-conservator pending approval for third accounting. Need to file Petition to terminate conservatorship

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

of estate before Court will consider this petition. Notice to bonding company waived by appearance this date.

THIS CASE IS SET FOR HEARING ON Request to be Removed as Co-Signer on the Bond and Co-Conservator of Kenneth Wayne Newton by Ethel Newton ["Petitioner"].

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

1. Petitioner alleges she initially agreed to sign the bond as cosigner because the bond company indicated July Newton-Curd and David Newton did not have an adequate credit history. Petitioner states this was over 5 years ago; David Newton's financial history has improved; and they no longer require a co-signer.
2. Petitioner also alleges there is no transparency in how Conservatee's financial matters are being addressed or resolved and claims there is a major problem with communication between herself and co-conservators, David Newton and July Newton-Curd, who purportedly agree that Petitioner be removed as co-signer of the bond and removal as co-conservator. Order Appointing Ethel entered 09/18/13. **Need** copy of conformed, amended letters that include Ethel Newton.
3. Petitioner request to be removed as co-signer of the bond and removed as co-conservator in this matter. **Need** Petition to Terminate Conservatorship of Estate.
4. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Inquire status.

(nb/lh)

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

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

CASE#: CON DS1000075

CASE NAME: KENNETH WAYNE NEWTON

SEE ALSO 19, 21

HEARING:

THIRD Account and Report of DAVID NEWTON and Petition for allowance of fees filed.

COUNSEL:

KATHRYN NEWTON	(CPE)...PRO/PER
DEBORAH COOKSEY	(CPE)...PRO/PER
GLORIA ROMAN	(CEP)...GEORGE F DICKERMAN
PUBLIC GUARDIAN	(CEP)...RALPH K HEKMAN
KENDRA NEWTON-FRANCISCO	(CPE/CP)...EDWARD B FISCHEL & ASSOC
JULY CURD	(CPE)...EDWARD B FISCHEL & ASSOC
EDWARD B FISCHEL	(PET)...
DONALD NEWTON	(CPE)...PRO/PER
DAVID BRIAN NEWTON	(CPE/CE)...EDWARD B FISCHEL & ASSOC
LYNDA ROYSTER	(CPE)...HARRY J HISTEN
BONZA-RHEE MURRAY	(CPE)...PRO/PER
CLAUDETTE SMITH	(CPE)...PRO/PER
WOODROW NEWTON	(PET)...MILES & HATCHER
PEGGY WALLACE-NEWTON	(PET)...MILES & HATCHER
LYNDA ROYSTER	(CPE)...HORSPOOL & PARKER
KENNETH WAYNE NEWTON	(CEP/CTE/CEE)...WALTER T. MOORE
MAZIO D ROYSTER	(CPE)...HORSPOOL & H ORSPOOL
E JOAN NELMS	(PET)...MARK J. FLORY
ETHEL L NEWTON	(PET/CE)...PRO/PER
AMERICAN CONTRACTORS INDEMNITY	(CRAIG P BRONSTEIN)
BOND SERVICES OF CALIFORNIA	(PRO/PER)
US SPECIALTY INSURANCE	(LANAK & HANNA)

Waiver of Court Fees and Costs filed by BONZA-RHEE MURRAY, DAVID NEWTON & ETHEL L NEWTON is GRANTED

TOTAL FEES WAIVED TO DATE: \$4842.50

GENERAL INFORMATION:

Continued from **10/16/17**. Court orders Mr. Fischel to serve a copy of his petition to Ethel Newton and David Newton. Court orders any and all objections to accounting

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.

must be served on all parties. Court deems the ex parte petition filed by Mr. Fischel as an objection to the accounting. Need notice to Ethel Newton And David Newton. Court orders all objections to be filed and served by 11/06/17. Reply to objection must be filed by 11/20/17.

Continued from 11/27/17. Parties report Mr. Fischel's issues have resolved. David Newton reports he filed objections as ordered but objections are not on the ROA nor has anyone been served a copy of his objections. The Court orders objections to third account and surcharge by mailed by 12/6/17 and filed and served by 12/13/17. (David Newton's objections to be on the same time schedule if not already filed and served.) Counsels agree to email or fax service. The Court orders the surety be noticed/served all documents.

Continued from 02/20/18. Court notes objection filed by Karin Horspool includes request to surcharge. Court strikes Mr. Fischel's objection as parties report his issues have settled. David Newton to file a verification of his objections. Mr. Horspool is ordered to supply parties with a copy of the previous order ordering attorney fees. Matter set for mediation. Court orders mediation briefs to be filed. Court will allow some parties to not be present for mediation provided they have a party present to negotiate on their behalf.

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

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

1. Accounting covers 10/01/14 to 09/30/16.
2. Assets on hand: \$157,504.30 (of which \$2,114.30 is cash, \$115,000 in carry value of real property and the balance in carry value of personal property)
3. Current bond posted in the amount of \$80,000. Appears sufficient.
4. Petitioner requests to exonerate bond. JTD
5. Petitioner does not request fees.
6. Disbursements – Schedule C includes bookkeeper fees of \$800.00. JTD.
7. Acknowledgment of satisfaction of Judgment by Edward Fischel filed 10/19/17.
8. Report of non-payment of court approved attorneys' fees filed 10/10/17.
9. **Need** Notice of Hearing and proof of service to U. S. Specialty Insurance Company who requested Special Notice and Walter T. Moore.
10. **Need** conformed copy of Notice of Hearing and proof of service.
11. **Response to Objection of Karin Horspool attorney for prior conservator, filed 10/27/17 by David Newton, current co-conservator.**
12. **Written objections filed 11/06/17 by Karin Horspool, Attorney for prior conservator, Lynda Royster.**
13. **Response to Objections of Karin E. Horspool filed 12/13/17 by Co-Conservator July Newton and Co-Signer on Bond, Ethel Newton, is not verified or served. Need same.**
14. **Amended Objections to Third Account Current and Report by David Newton filed 02/20/18 with proof of service.**
15. No proposed order. Submit Order after Hearing.

RECOMMENDATION

Need to clear notes then set for contested hearing. If approved, set next hearing for Accounting Review on **12/03/18**.

(nb/cs/nb/lh)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: CON DS1000075

CASE NAME: KENNETH WAYNE NEWTON

SEE ALSO 19, 20

HEARING:

Trial Setting Conference

COUNSEL:

KATHRYN NEWTON	(CPE)...PRO/PER
DEBORAH COOKSEY	(CPE)...PRO/PER
GLORIA ROMAN	(CEP)...GEORGE F DICKERMAN
PUBLIC GUARDIAN	(CEP)...RALPH K HEKMAN
KENDRA NEWTON-FRANCISCO	(CPE/CP)...EDWARD B FISCHEL & ASSOC
JULY CURD	(CPE)...EDWARD B FISCHEL & ASSOC
EDWARD B FISCHEL	(PET)...
DONALD NEWTON	(CPE)...PRO/PER
DAVID BRIAN NEWTON	(CPE/CE)...EDWARD B FISCHEL & ASSOC
LYNDA ROYSTER	(CPE)...HARRY J HISTEN
BONZA-RHEE MURRAY	(CPE)...PRO/PER
CLAUDETTE SMITH	(CPE)...PRO/PER
WOODROW NEWTON	(PET)...MILES & HATCHER
PEGGY WALLACE-NEWTON	(PET)...MILES & HATCHER
LYNDA ROYSTER	(CPE)...HORSPOOL & PARKER
KENNETH WAYNE NEWTON	(CEP/CTE/CEE)...WALTER T. MOORE
MAZIO D ROYSTER	(CPE)...HORSPOOL & H ORSPOOL
E JOAN NELMS	(PET)...MARK J. FLORY
ETHEL L NEWTON	(PET/CE)...PRO/PER
AMERICAN CONTRACTORS INDEMNITY	(CRAIG P BRONSTEIN)
BOND SERVICES OF CALIFORNIA	(PRO/PER)
US SPECIALTY INSURANCE	(LANAK & HANNA)

Waiver of Court Fees and Costs filed by BONZA-RHEE MURRAY, DAVID NEWTON & ETHEL L NEWTON is GRANTED

TSC—no notes—JTD

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

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

CASE#: CON PS1600051

CASE NAME: ANDREW B HUBBARD

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of JOSEPH HUBBARD

COUNSEL:

JOSEPH HUBBARD	(PCR)...MATTHEW J SINGER
MARIA MINDA HUBBARD	(PCR)...MATTHEW J SINGER
ANDREW B HUBBARD	(CEE)...PRO/PER

GENERAL INFORMATION

Continued from **01/18/17** and **04/05/17**. No appearance at last hearing. Conservators ordered to appear.

Continued from **06/07/17**. Counsel reports that Joseph Hubbard, Conservator/father, has passed away.

Continued from 08/09/17 and **09/27/17**.

Continued from 11/22/17 to clear probate notes.

Continued from 02/07/18 at request of Court; Joseph and Maria Hubbard and/or Counsel ordered to be present at next hearing.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Joseph & Maria Hubbard, parents, appointed conservator of the person only on 09/14/16. **Need** amended letters as to Maria only.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 12/08/17. **Need** proof of service as to Shakira Hubbard, sister and John Chamberlain, brother.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 is not signed, and attachment 3b is not included as alleged. **Need** same.
4. **Need** Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION

Need to clear notes 1-4.

(lc/ww/lh)

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

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

CASE#: CON PS1700468

CASE NAME: MTR OF MICHAEL ALEXANDER TAFOYA

HEARING:

Petition for Appointment of Conservator

COUNSEL:

LEONARD PAUL TAFOYA SR (CP)...MATTHEW ANDREWS
ROXY TAFOYA (CP)...PRO/PER
MICHAEL ALEXANDER TAFOYA (CTP)...

GENERAL INFORMATION

Continued from 02/07/18 at request of Counsel to clear probate notes. Notice to be given by Mr. Andrews.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Leonard Paul Tafoya, Sr to appoint Leonard Paul Sr and Roxy Tafoya (parents)

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

1. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, consent/withhold consent to marriage, limit right to contract, control social/sexual contacts, and make decisions re education. JTD
2. Petitioner seeks Court order limiting civil rights of conservatee described in note 1. JTD
3. Petitioner seeks medical powers. Capacity Declaration filed 12/22/17.
4. Proposed conservatee is developmentally disabled. **Need** appointment of counsel for report.
5. Proposed conservatee is developmentally disabled. **IRC report filed 02/01/18.**
6. **CI Report filed 02/02/18.**
7. Confidential Screening Form by Leonard Tafoya, Sr, is missing attachment #20 regarding person living in home with assigned social worker, probation officer, etc. **Need** verified supplement.
8. **Need** list of required contacts (Local form SB-12224).

9. Petition, item #11, relationship of relatives is missing. **Need verified supplement.**
10. **Need** notice of hearing and proof of service as to Gloria Torrez.
11. Return of Citation filed 04/04/18.
12. Proof of Completion of the Conservatorship Training Class filed 01/30/18.
13. ~Proposed Form Order: 12/22/17

RECOMMENDATION

Need to clear notes 7-10. Court's discretion re 30-day continuance. If approved, set hearing for Compliance Review for **11/21/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh)

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

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

CASE#: CON PS1800067

CASE NAME: MTR OF LEANORE Y HERNANDEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

THERESA HERNANDEZ (CPE)...MICHAEL J ARMENTA
LEANORE Y HERNANDEZ (CEP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Theresa Hernandez, daughter/nominee

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

1. Petitioner seeks bond in an amount to be determined by Court. Note: estate assets consist solely of social security totaling less than \$15,000 per year. Question need for estate powers? Alternatively, Court may wish to set minimum bond of \$20,000. **JTD**
2. Petitioner seeks orders for all powers described under Pr. C. §§2590-2591; however, does not indicate reasons for each power is requested in attachment 1d. [Petition, 3/9/18,LFpg10]. **Need** verified supplement.
3. Petitioner seeks medical powers. Capacity Declaration filed 04/02/18 includes dementia attachment; however, dementia powers are not requested in petition. **Question if dementia powers are also sought? If so, need mandatory dementia attachment form GC-313. Need verified supplement clarifying.**
4. **Need** Court Investigator report.
5. List of required contacts filed 03/09/18; however, no grandchildren were included. **Need** completed form.
6. **Need** return of citation.
7. **Proof of** Completion of the Conservatorship Training Class filed 04/05/18.
8. ~Proposed Form Order: 03/09/18

RECOMMENDATION

Need to clear notes #2-6. If approved, set hearing for Compliance Review for **11/21/18** for the filing of the required documents and hearing re Accounting Review for **06/26/19**
Any accounting to be filed 30 days in advance.

(lh)

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

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

CASE#: CON PS1800080

CASE NAME: Mtr of Soledad Theresa Garcia Salazar

HEARING:
Petition for Appointment of Conservator

COUNSEL:

CELENA SALAZAR (CP)...PRO/PER
SOLEDAD THERESA GARCIA SALAZAR (CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Celena Salazar, daughter

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

1. Petition is incomplete at item #5f as to whether proposed conservatee is developmentally disabled. Court to inquire.
2. Petitioner seeks medical powers. **Need** Capacity Declaration.
3. **Need** list of required contacts (Local form SB-12224).
4. **Need** return of citation.
5. **Need** Certificate of Completion of the Conservatorship Training Class.
6. **Need** notice of hearing and proof of service.
7. CI report filed 04/03/18.
8. ~Proposed Form Order: 03/14/18

RECOMMENDATION

Need to clear notes #2-6. If approved, set hearing for Compliance Review for **11/21/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5

(lh)

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

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

CASE#: RC RS00256

CASE NAME: ANGELA JENNER

HEARING:

Fourth Current Account and Report of VERLENE CAMERON and
Petition for allowance of fees

COUNSEL:

GARY JENNER	(PET)...PRO/PER
TAMAR LAFLEUR	(PET)...PRO/PER
ANGELA JENNER	(PCE/CEP)...FULLERTON LEMANN SCHAEFER &
VICKY A MATTHES	(CPE)...J. DAVID HORSPOOL
ANGELA JENNER	(CEP)...ANNETTE G DEBELLEFEUILLE
VERLENE CAMERON	(SC/CPE)...JOHN D MICKUS
ANNETTE G DEBELLEFEUILLE	(PET)...ANNETTE G. DE BELLEFEUILLE
PUBLIC GUARDIAN	(CPE/TP)...COUNTY COUNSEL
BOND SERVICES OF CALIFORNIA	(PRO/PER)
AMERICAN CONTRACTORS INDEMNITY	(LANAK & HANNA)

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Fourth Account Current and Petition for Fees
by Verlene Cameron, PPF

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

1. Account period covers 11/1/15 to 10/31/17
2. Assets on hand **\$515,857.60** consisting of cash and burial trusts.
3. **Need** financial statement re Pacific Western Bank CD acct x5212 to support value of \$121,597.55 in Schedule E. [Acct, 2/2/18, LFP15].
4. Conservatee's father passed away in July, 2017. Petitioner alleges she interviewed family members and determined an appropriate amount for conservatee to pay for her share of services at request of conservatee. Conservatee's total contribution share of funeral expenses to Forest Lawn was \$8,860.00. **Need verified supplement addressing the following:**
 - a. **Need** itemization of costs and allocation of conservatee's share.
 - b. Prior 3rd accounting indicates conservatee purchased a burial plot for her father on 1/30/14 for \$3,105 [Acct, 2/1/16, LFPg3; 11]. Question if burial

plot purchase was considered in determination of conservatee's allocated share, or if conservatee was ever reimbursed?

5. Petitioner requests fees of **\$4,437.50** billed at \$125/hour for 35.5 hours. Itemized. [Acct, 2/2/18, LF p.28-31]. **JTD**
6. Attorney requests fees of **\$2,905** billed for attorney at \$350/hour and paralegal at \$105/hour for 9.7 hours. Itemized [Acct, 2/2/18 LFP.33-34]. **JTD**
7. Bond is currently set at \$511,000 and petitioner requests bond increased by \$91,000 for a total bond of \$668,000. Appears adequate. **JTD**
8. Notice is complete.
9. No proposed order.

RECOMMENDATION:

Need to clear notes #3-4. If approved, set hearing re next Accounting Review for **01/16/19** (if one year) or **01/15/20** (if two years). Accounting to be filed 30 days in advance.

(lh)