



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 04/23/18

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.

(04/09/18 & 04/18/18 ww)(04/05/18 cs)

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: 04/23/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1100143

CASE NAME: MTR OF PAUL ROSS

HEARING: Sixth Account and Report of INLAND COUNTIES REGIONAL CENTER
INC and Petition for allowance of fees filed.

COUNSEL:

INLAND COUNTIES REG CNTR (PET/TEE)...STEVEN K BECKETT
SPECIAL NEEDS TRUST OF PAUL ROSS (TRU)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Fifth Account and Report of Trustee and for fees

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

1. Accounting covers 01/01/16 – 01/31/18.
2. Assets on hand: \$44,801.15 (pooled investment fund held in Master Trust).
3. Petitioner requests approval of fees already taken in the amount of \$2,250.00. JTD
4. Petitioner requests authority to take future payments of \$1,250.00 based on its fee schedule (i.e., \$1,250.00 for the first \$50,000 and 2% of the trust assets on the next \$250,000. Billed quarterly). JTD
5. Attorney requests fees of \$1,275.00 Billed at \$100/\$250 for 9.30 hours for paralegal and attorney services respectively. Itemized [LF, p.5 to declaration filed 03/01/18].
6. Petitioner requests to amend the trust to add provisions regarding "Medicaid" language. [LF pgs.36-39 and 45-48] **JTD**
7. **Need** updated Due Diligence declaration as to beneficiary's siblings. Petitioner indicates a Due Diligence Declaration was filed 11/13/14.
8. Petitioner requests that due to low balance of trust assets, an accounting review hearing be held in two (2) years. JTD
9. ~Proposed Order: 03/01/18

RECOMMENDATION:

Need to clear note 7, then Court's discretion re note 6. If approved, set hearing re next Accounting Review for **05/08/19** (if one year) or **04/06/20** (if two years). Accounting to be filed 30 days in advance.

(cs)

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

DATE: 04/23/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700572

CASE NAME: MTR OF DAVID HOFFMAN

HEARING:

Report of administration & pet. for final etc Account and Report
of AUDREY J BERNHARD and Petition for allowance of fees filed.

COUNSEL:

AUDREY J BERNHARD (PET)...IGNAZIO FICARA
DAVID HOFFMAN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of
Account and for Fees by Audrey Bernhard, mother/administrator

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

1. Final Inventory and Appraisal filed 11/17/17; however, need bank statement in
support of date of death balance for Union Bank account #2918.
 - a. Confidential statement in support of Final Inventory and Appraisal filed
04/10/18; however, statement is for the period of 03/08/17-04/06/17. **Need**
statement that includes date of death of 04/16/17.
2. Assets on Hand \$533,589.88 in cash; unimproved real property in Needles valued
at \$56,000.00; unimproved real property in Brawley valued at \$2,500.00; and an
unsecured promissory note in the amount of \$5,600.00.
3. Petitioner waives statutory compensation.
4. Attorney requests statutory fees of \$20,075.03. Calculated.
5. Notice is complete.
6. ~Proposed Order: 02/15/18

RECOMMENDATION

Need to clear note 1 then Court's discretion. If approved, set hearing re receipts and final
discharge for **04/29/19**.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700691

CASE NAME: CARL F NELSON

HEARING:

Report of administration & Pet. for final etc Account and Report
of JAMES R NELSON and Petition for allowance of fees filed.

COUNSEL:

JAMES R NELSON (PET)...IGNAZIO FICARA
CARL F NELSON (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON First and Final on Waiver Account and Petition for allowance of Fees, by brother, James Nelson, [Executor/Petitioner]

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

1. Assets on Hand \$269,429.72 consisting of \$110,095.10 cash and remaining assets in real property, stocks and personal property.
2. Petitioner waives statutory commission.
3. Statutory fees in the amount of \$8,388.59 requested. Calculated.
4. **Need** findings whether estate is solvent.
5. Notice given.
6. Proposed Order does not include findings re whether the estate is solvent.

RECOMMENDATION

Need to clear note 4, then Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **04/29/19**.

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800153

CASE NAME: MTR OF JAMES ESTELL ROOF

HEARING:

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

COUNSEL:

ANJANET MARIE ROOF (PET)...IGNAZIO FICARA
JAMES ESTELL ROOF (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by daughter, Anjanet Roof, [Administrator/Petitioner].

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

1. All heirs waive bond. Net estate value \$238,500 with \$9,500 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters. Prob. Code §8481(b).
2. ~Proposed Form Order: 02/20/18

RECOMMENDATION

RFA. Court's discretion re bond. If approved, set Accounting/Status Review for **07/01/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800233

CASE NAME: KYLE RICHARD SILVA

HEARING:

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

COUNSEL:

GUSTAVO SILVA (PET)...HORSPPOOL & HORSPPOOL
KYLE RICHARD SILVA (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Gustavo Silva, father

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

1. Petitioner alleges to be sole heir and waives bond. Net value of the estate consists of \$95,000.00 of which \$50,000.00 is personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. ~Proposed Form Order: 03/12/18

RECOMMENDATION

RFA. Court's discretion re bond. If approved, set Accounting/Status Review **07/01/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800262

CASE NAME: Mtr of Joe A Gonzales

HEARING:
Spousal Property Petition hearing.

COUNSEL:
LINDA L GONZALES (PET)...PRO/PER
JOE A GONZALES (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition, by Linda Gonzales, [spouse/Petitioner].

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

1. Petitioner, Linda Gonzales, seeks court to determine and confirm her half of community property and determine that decedent's half transfers to petitioner without administration. Specifically, real property located in Fontana, CA.
2. Petitioner and decedent were married on 12/02/78. Decedent received property on 04/15/76 prior to marriage.
3. Petitioner indicates decedent and petitioner were self-employed as truck drivers from 1978 to 1999 and employed with Union Carbide. They finished their carriers working for separate companies. Petitioner alleges community funds were used to pay the mortgage from the date of marriage until the property was paid off in 2002.
4. Petitioner indicates decedent received about \$18,000 by way of personal injury case. **Need** clarification as what monies were used for, when received, and what claim petitioner seeks regarding these monies.
5. Notice given.
6. ~Proposed Form Order: 03/16/18

RECOMMENDATION:

Court's discretion.

(cs)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIPS

DATE: 04/23/18 TIME: 8:30 DEPT: S35P

CASE#: SC SS02412

CASE NAME: MTR OF JAIME B. AGUILAR

HEARING: THIRD Account and Report of DIANE D HARKISON and Petition for allowance of fees filed.

COUNSEL:

BARDOMIANO AGUILAR	(CPE/SC)...LAYNE A BARTHOLOME
CONSUELO AGUILAR RODRIGUEZ	(SC/CE)...PRO/PER
CONSUELO RODRIGUEZ	(CE/CP)...LAYNE A BARTHOLOMEW
CONSUELO RODRIGUEZ	(CE)...WALTER T MOORE
DIANE D HARKISON	(CE)...MARIELLEN ROSS
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
JAIME B AGUILAR	(CTE/CEP)...DONNASUE ORTIZ
JAMES B CHURCH	(TP)...JAMES B CHURCH &
LAYNE A BARTHOLOMEW	(PET)...LAYNE A BARTHOLOMEW
ROSA D AGUILAR	(SC/CPE)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Third and Current Account, Ratification of Acts, and Petition for Fees by Diane Harkison, conservator of the estate only/PPF

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

1. Accounting period: 01/01/16-10/31/17
2. Assets on hand: \$741,586.36 of which \$71,627.57 is cash and the rest in real property, a vehicle, and equities.
3. Current bond: \$593,900.00. Petitioner requests for a bond reduction of \$109,297.42 for a total bond of \$474,147.25. Appears sufficient. **JTD**
4. Petitioner requests fees in the amount of \$22,084.05 for 235.23 hours at various rates between \$45-120/hour. Itemized. [LF, pgs. 26-53]. **JTD**
5. Attorney requests fees in the amount of \$5,200.00. Billed at 13.0 hours at \$400.00/hour. Itemized. [LF, pg. 55]. **JTD**
6. Notice given.
7. ~Proposed order: 04/17/18

RECOMMENDATION:

Court's discretion. If approved, Court to set next accounting review for **02/11/19**. (ww)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/23/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800071

CASE NAME: MTR OF JOSEPH SUPANGKAT

HEARING:

Petition for Appointment of Conservator

COUNSEL:

KUSHARIYANTO SUPANGKAT

(CP)...PRO/PER

VONNY TIDAYOH

(CP)...PRO/PER

JOSEPH SUPANGKAT

(CTP)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Kushariyanto Supangkat and Vonny Tidayoh, parents

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

1. No bond- person only
2. Petitioner seeks medical powers. **Need** Capacity Declaration.
3. Proposed conservatee is developmentally disabled. **Need** appointment of counsel for report.
4. Proposed conservatee is developmentally disabled. Court to see Letter from IRC filed 04/12/18. **Need** IRC report.
5. Petitioners request Pr. C. § 2351.5 decisions concerning education, authority to fix the residence/dwelling; authority to access confidential records/documents/reports & other info regarding the proposed conservatee, including those in the possession of the Regional Center, the right to consent or withhold consent to marriage/domestic partnership, authority to control the right of conservatee to contract, authority to make & consent to medical decisions for the conservatee,.
6. Petitioner seeks civil rights not be limited without court order. **JTD**
7. **Need** Court Investigator Referral Report (Local form SB-360)
8. **Need** return of citation
9. **Need** Certificates of Completion of the Conservatorship Training Class.
10. **Need** Notice of Hearing and proof of service.
11. CI report filed 04/17/18.
12. No Form Order Provided.

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

RECOMMENDATION

Need Appointment of Counsel, IRC report, and to clear notes 2, 7-10. If approved, set hearing for Compliance Review for **11/26/18** 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.

(ww)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PUBLIC GUARDIAN**

DATE: 04/23/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1100189

CASE NAME: IN MATTER RE FREDRICK LONIELLO

HEARING: THIRD Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN
FREDRICK LONIELLO

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

GENERAL INFORMATION:

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

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

1. Accounting period: 04/05/14-03/14/16
 - a. Conservatee passed away; however, it is unclear as to the accurate date of death as the petition indicates 05/09/15 on pg. 4 then 03/09/15 on pg. 10. Court may wish to clarify.
 - b. Does Court wish for an amended accounting to include pre and post death accounting periods per Pr.C. § 2620?
2. Assets on Hand: \$2,013.19 in cash.
3. Public Guardian requests compensation in the amount of \$4,850.00. **JTD**
 - a. It appears that \$100.00 of current fee request was collected towards the July 2014 monthly service fee on 12/30/14. [LF. pg. 19] Does Court wish to reduce total amount owed to \$4,750.00 and confirm previous amount collected? **JTD**
4. County Counsel request fees in the amount of \$2,750.00. **JTD**
 - a. It appears that \$200.00 of current fee request was collected towards the July 2014 monthly service fee on 12/30/14. [LF. pg. 19] Does Court wish to reduce total amount owed to \$2,550.00 and confirm previous amount collected? **JTD**
5. Conservator and Counsel failed to date their signatures. [LF pg. 11] **JTD**
6. Notice is complete.

7. Proposed Order: 09/12/17 however, fee amounts may change depending on Court's decision on notes 3 & 4.

RECOMMENDATION:

Court's discretion. If approved, set for Final Discharge on **04/29/19**.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300348

CASE NAME: Rhonda J. Pearsall

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
RHONDA J PEARSALL (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Order denying petition for reappointment of conservator entered 05/05/17.

Continued from 08/14/17

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Settling First Account granted 08/29/16; second and final account now due.
2. No accounting or waiver of account. Need same.

RECOMMENDATION:

Inquire status.

(nb/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400037

CASE NAME: Deanna L Wachtel

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN
DEANNA L. WACHTEL

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

Ex Parte Order that Conservator need not present 2nd Account by PG approved and forwarded to Department for signature. Next Accounting Review date to be set on **06/24/19**.

(ww)

Future hearing dates: 04/27/18 Court Trial

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400051

CASE NAME: Shawn P Hughes

HEARING:

Petition for ORDER REFERRING CONSERVATEE FOR AN ASSESSMENT BY
THE MENTAL HEALTH INVESTIGATOR OF SB

COUNSEL:

SHAWN P HUGHES	(CEP)...EDWARD B FISCHER
ARTHUR A CAPPILLA	(CP)...HORSPOOL & HORSPOOL
BARBARA E BOWERSOCK	(TP)...BARBARA E BOWERSOCK

X-REF: FSB 1302655

GENERAL INFORMATION:

Continued from **04/04/17 and 07/24/17** at request of counsel.

Continued from 10/16/17 to be heard by Judge Reichert.

THIS CASE IS SET FOR HEARING ON Petition for Order Referring Conservatee for an Assessment by the Mental Health Investigator of San Bernardino County [Welfare & Inst. Code § 5650.5].

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

1. Petitioner, Arthur A. Capilla, is the conservator of the person and estate of Shawn Hughes. Petitioner was subsequently appointed as the LPS Conservator of the person, but that conservatorship proceeding was terminated. Both the probate conservatorship and the LPS conservatorship proceedings were pending in Riverside County, when, on 02/7/14, the probate conservatorship was transferred to San Bernardino County.
2. Petitioner alleges the LPS conservatorship was to have been transferred at the same time, but, due to a clerical error, it was not transferred to San Bernardino County until 03/10/14, after it was terminated by operation of law. Petition indicates there is currently no pending LPS proceeding for Shawn Hughes.
3. Petition indicates that on 06/22/13, Shawn Hughes was arrested in the related case and on 11/14/13, Shawn was found mentally incompetent. On 03/20/15, Shawn was found mentally competent to stand trial and the criminal proceedings were reinstated.

4. Petitioner states that on 02/07/17, Petitioner was informed that Shawn was going to be readmitted to Patton State Hospital for further treatment for his mental capacity.
5. Petitioner proffers Welfare & Inst. Code § 5650.5 as authority for this Court to re-establish the LPS Conservatorship and requests this matter be referred to the Mental Health Investigator of the County of San Bernardino, or to such other person or entity that has been designated by the Director of the San Bernardino County Department of Behavioral Health, for an assessment by the local mental health system to determine if the conservatee has a treatable mental illness, including whether the conservatee is gravely disabled as result of a mental disorder and is unwilling to accept, or is incapable of accepting, treatment voluntarily; and directing that the assessment be filed with this Court within 30 days from the date of the referral.
6. **Confidential Assessment filed 04/04/17.**
7. **Report of Court-Appointed Attorney, Edward B. Fischel, filed 06/20/17.**
8. Notice given.
9. ~Proposed Order 02/22/17.

RECOMMENDATION:

Court's discretion.

(nb/cs)

Future Hearing: 6/23/18 Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1500028

CASE NAME: CHERYL HINES

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
CHERYL HINES (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters terminated on 04/15/16.

Continued from 12/12/16 and 07/17/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Public Guardian appointed temporary conservator of the person and estate on 02/06/15, no bond, then general conservator of the person and estate on 03/06/15, no bond.
2. Petition for Reappointment of Conservator was denied on 04/15/16.
3. **Need** 1st and final account beginning with date of 02/06/15.

RECOMMENDATION:

Inquire status.

(nb/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600165

CASE NAME: MTR OF LUCRECIA O'BRIEN

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
LUCRECIA O'BRIEN (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 07/22/17. Conservatorship terminated on 10/21/16.

Continued from 06/19/17

Order Granting Petition for Termination of Conservatorship entered 12/12/16

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Appointing PG as Temporary Conservator of the person and estate granted 06/23/16; order on general appointment granted 07/22/16.
2. Need first and final account.

RECOMMENDATION:

Inquire status.

(nb/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600195

CASE NAME: MTR OF ROBERT J ALDRED

SEE ALSO 16

HEARING:

Hearing Re: STATUS OF PT CRUISER

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ROBERT J ALDRED	(CEP)...J. DAVID HORSPOOL
KENNETH DAVID HERRING	(CPE)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status of PT Cruiser

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

1. Hearing set by Court on 10/02/17 at the Hearing re: Status re payments & receipt hearing.
2. Court did not make orders re: PT Cruiser.

RECOMMENDATION

Court's discretion.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600195

CASE NAME: MTR OF ROBERT J ALDRED

SEE ALSO 15

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ROBERT J ALDRED	(CEP)...J. DAVID HORSPOOL
KENNETH DAVID HERRING	(CPE)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review

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

1. PG appointed as temporary conservator of the person and estate on 07/25/16 then general conservator of the estate only on 04/18/17, no bond.
2. **Need** 1st accounting beginning with date of 07/25/16.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 10:00 DEPT: S35P

CASE#: SC SS6525

CASE NAME: IN THE MATTER OF MELVIN V GOFFNEY

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
MELVIN V GOFFNEY (CEP)...

GENERAL INFORMATION

Continued from 01/30/17 and 08/14/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order that Conservator need not present 27th Account granted 06/27/16; account or waiver of account now due.

RECOMMENDATION:

Inquire status.

(nb/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS02698

CASE NAME: MTR RE ALICE GUERRERO

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
ALICE GUERRERO (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters Expire 06/20/18.

Continued from 10/23/17 and 02/05/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present 7th Account by PG approved on 09/24/15.
2. **Need** 8th accounting or waiver of accounting by PG beginning with date of 07/01/15.

RECOMMENDATION:

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

(nb/ww/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS02775

CASE NAME: MATTER OF JOHN DRUMMOND

HEARING:

Petition for Order Authorizing Donating of Personal Property

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

JOHN DRUMMOND

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters Expire: 02/17/19

THIS CASE SET FOR HEARING ON Petition for Order Authorizing Donating of Personal Property by PG, conservator of the person and estate

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

1. Petitioner requests to donate one laptop; one printer; one camera; power cords; books; shoes; one LP records; clothes; and miscellaneous items, to wit, as it would be in the best interest and to the advantage of the estate. **JTD**
2. Items have been appraised by Burdette M. Garvin with a value of \$100.00.
3. Notice is complete.
4. ~Proposed Order: 03/08/18

RECOMMENDATION

Court's discretion.

(ww)

Future Hearing: 12/03/18 Accounting Review

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/23/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS5600

VACATED

CASE NAME: IN THE MATTER OF DANIEL PORTER

SEE ALSO 21

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

DANIEL PORTER

(CEP)...HARTNELL LAW GROUP

JOHN M PORTER

(TP)...LEWIS BRISBOIS BISGAARD & SMITH

Duplicate setting. See notes on matter 21.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS5600

CASE NAME: IN THE MATTER OF DANIEL PORTER

SEE ALSO 20

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
DANIEL PORTER	(CEP)...HARTNELL LAW GROUP
JOHN M PORTER	(TP)...LEWIS BRISBOIS BISGAARD & SMITH

27th Waiver of Account sent to department for signature on 04/17/18. Clerk's office to set next Accounting review for **05/13/19**.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

CONSERVATORSHIP

DATE: 04/23/18 TIME: 8:30 DEPT: S36P

CASE#: CON PS1300060

CASE NAME: DORIS M. CARROLL

HEARING:

Petition for attorney's fees

COUNSEL:

LOWETA CARROLL

(CPE)...KEITH S WALKER

DORIS M CARROLL

(CEP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for fees and compensation
THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

- 1 Petitioner, Mark J. Flory, was appointed on 06/15/17. Petitioner alleges that services have been rendered for which counsel has not been compensated for the period 06/15/17 to current.
- 2 Attorney requests fees of \$2,472.38. Billed at \$350 hour for attorney time and \$105 hour for paralegal time. Itemized [7-12].
- 3 Notice given.
- 4 Petitioner requests an order directing and ordering Conservator to pay requested sum.
- 5 ~Proposed Order: 03/08/18

RECOMMENDATION:

Court's discretion.

(cs)

Future Hearing: 5/03/18 1st Account and Report

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 04/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400536

CASE NAME: ELLEN R WHITE

HEARING:
Hearing re Final Discharge

COUNSEL:
BONNIE JONES (PET)...LAW OFFICES OF RYAN S CARRIGAN
ELLEN R WHITE (DEC)...
BERNARD M BIDART (TP)...

GENERAL INFORMATION

Continued from **12/04/17**. Nonappearance and final discharge has not been filed.
Continued from 01/22/18 and 03/05/18 non-appearance. Counsel and parties ordered to be present tat next hearing.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Bonnie Jones, daughter, approved on 11/30/16.
2. No receipts needed as only real property remains.
3. **Need** \$265 fee waiver payment of \$265 for denied fee waiver which must be paid in full prior to discharge.
4. **Need** Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b).

RECOMMENDATION:
Inquire status.

(ww/cs)

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

DATE: 04/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400726

CASE NAME: Abraham C. Ramirez

SEE ALSO 4

HEARING: Re: First and Final Account (Dorothy Harmon)

COUNSEL:

DOROTHY R HARMON	(PET)...JENNIFER M DANIEL
ABRAHAM C. RAMIREZ	(DEC)...
PUBLIC ADMINISTRATOR	(PET)...CRAIG M PARKER

GENERAL INFORMATION

Continued from **02/02/17 and 03/23/17**. Court order the administrator, Dorothy Harmon to pay back the administrator fees that she paid herself without prior court order. Court notifies the Public Administrator of possible appointment. If a proper accounting is not filed prior to the next hearing the court shall appoint the Public Administrator as the successor administrator.

Continued from **05/11/17**. A request for continuance was received. The court suspends the powers of the administrator. The Public Administrator is appointed as the Special Administrator. Notice by Judicial Assistant.

Continued from **07/11/17**. Craig Parker represents all assets were distributed to prior administrator. Matter is continued by the Court to allow petitioner to file proper accounting. Continued from **09/12/17**. Matter is continued. Dorothy Harmon states that she is retaining Attorney Jennifer Daniel. Dorothy Harmon is collecting the documents that counsel has requested.

Continued from **11/28/17** Waiver of accounting out for signature.

Continued from **01/22/18** Waiting on signatures on waivers.

Continued from 03/05/18 at request of counsel to clear probate notes.

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees by prior administrator, Dorothy Harmon ["Petitioner"].

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

1. It cannot be determined if the accounting balances as it does not comply with Pr.C.§10900 and Pr.C.§1060 et. seq. **Need** a proper summary of account, report and accounting schedules.
2. **Need** verification per Pr.C. § 1021.
3. Proposed order is not proper.
4. Amended accounting filed. See notes on next matter #4.

RECOMMENDATION

Need to file a proper accounting and report.

(lc/nb/ww/cs)

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

DATE: 04/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400726

CASE NAME: Abraham C. Ramirez

SEE ALSO 3

HEARING:

Amended First and Final Account and Report of DOROTHY R HARMON
and Petition for allowance of fees filed.

COUNSEL:

DOROTHY R HARMON	(PET)...JENNIFER M DANIEL
ABRAHAM C. RAMIREZ	(DEC)...
PUBLIC ADMINISTRATOR	(PET)...CRAIG M PARKER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON First and Final Report on Waiver of Account; Petition for allowance of Fees and for Ratification and Approval of Final Distribution, by daughter, Dorothy Harmon [Administrator/Petitioner]

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

1. Need waiver of account by Eric Ramirez and Steven Ramirez.
2. Assets on Hand \$0.
3. Petitioner alleges all assets have been distributed. [Amended Accounting 03/05/18, LF p. 6]. Distribution includes Joseph Ramirez. Question if Joseph Ramirez is the same person as Joe Ramirez named in petition. Court to clarify.
4. **Need** to file notice of Proposed Action with poof of service on the sale of the real property.
5. **Need** Notice of Hearing with proof of service of amended accounting to Public Administrator.
6. Petitioner is entitled to statutory fees of \$9,393.87, calculated. However, petitioner requests the court ratify her discounted fee of \$5,000 which have been received.
7. No attorney statutory fees are being requested.
8. No Proposed Order submit after hearing.

RECOMMENDATION

Need to clear notes 4-5, then Court's discretion. If approved, set hearing on the filing of receipts and final discharge for /

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500764

CASE NAME: JASON DAVIS SPECIAL NEEDS TRUST

HEARING: Petition for payment of attorneys' fees for court-appointed
Guardian Ad Litem

COUNSEL:

JASON DAVIS SPECIAL NEEDS TRUST (TRU)...
JASON DAVIS (BEN)...
CAROL ROBERTS (PET/TEE)...GOMEZ LAW GROUP
J. DAVID HORSPOOL (PET)...HORSPOOL & HORSPOOL
THE JASON DAVIS SPECIAL NEEDS (TRU)...

XREF: CONPS1600318 MTR OF JASON DEAN DAVIS

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for fees and compensation, by J. David Horspool, [GAL/Court appointed attorney/Petitioner]

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

1. Petitioner, J. David Horspool, was appointed GAL of Jason Davis in the SNT on 09/28/15 and appointed as counsel in the conservatorship matter on 11/29/16.
2. Petitioner alleges that services have been rendered for which counsel has not been compensated from 11/29/16 to current in his capacity as GAL and court appointed counsel.
3. Attorney requests total fees of \$8,897.50. Billed at \$175-\$300/hour for attorneys' time as follows:
4. \$6,222.50 as GAL for 21.70 hours. [LFp.7]
5. \$2,675.00 as appointed counsel for 10 hours. [LFp.10].
6. It appears fees are also requested for attorney Trevor D. Martin. JTD
7. Petitioner requests a Court order directing and ordering Trustee to pay requested sum as trust is paying the fees of the conservatorship.
8. **Need** statement re VA benefits received and from a state hospital.
9. Notice given.
10. ~Proposed Order: 03/13/18

RECOMMENDATION:

Need to clear note 5, then Court's discretion.

(cs)

Future Hearing: 5/16/18 Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600150

CASE NAME: DAREL STEVEN McNORTON

HEARING:

Accounting Review by ***

COUNSEL:

WILLIAM SWIM (PET)...PRO/PER
DAREL STEVEN MCNORTON (DEC)...

GENERAL INFORMATION:

Continued from **06/13/17** Court directs the administrator to file an Inventory & Appraisal forthwith as it has not been filed as of yet.

Continued from **08/22/17**. No appearance nor has the accounting been filed. Court orders William Swim to personally be present at next hearing. Notice by Judicial Assistant.

Continued from **10/10/17** Court orders William Swim to be present.

Continued from **12/18/17**. I&A needs to be completed by a probate referee.

Continued from 03/05/18. No appearance. William Swim informs court he is unable to attend hearing and requests a continuance.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters Testamentary issued to William Swim, friend/executor on 04/19/16, full authority, no bond.
2. Final Inventory and Appraisal filed 10/10/17; however, assets other than cash must be appraised by a Probate Referee. **Need** corrected Final Inventory and Appraisal.
3. **Need** accounting or status report.

RECOMMENDATION:

Need to clear note 2 and 3. When the personal representative does not file an accounting or report as required, the court shall take action as specified in Pr.C. § 11050 et seq.

(nb/cs/nb/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600364

CASE NAME: JOSEPH MARIE RODRIGUEZ

HEARING:

Accounting Review by ***

COUNSEL:

JOE M RODRIGUEZ JR (PET)...THOMAS V PRATT
JOSEPH MARIE RODRIGUEZ (DEC)...

GENERAL INFORMATION

Continued from **08/14/17**. Nonappearance by counsel and petitioner. A status report or accounting to be filed prior to hearing.

Continued from 10/23/17. Status report approved.

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Joe Rodriguez Jr, on **06/27/17**; full authority, \$100,000 bond.
2. Final Inventory and Appraisal filed 12/06/17.
3. **Need** accounting or status report.

RECOMMENDATION

Inquire status.

(ww/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601056

CASE NAME: MTR OF AMELIA E SMITH

HEARING:

Probate status report filed.

COUNSEL:

NATALIE BECK FRIERSON (PET)...MYERS & D'ANGELO
AMELIA E SMITH (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Natalie Frierson
[executor/Petitioner].

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

1. Petitioner alleges the estate is not in a condition to be closed as there is still one last parcel of real estate to be sold which is preventing this administration from closing.
2. Petitioner requests an additional 6-9 months to close the estate.
3. Partial Inventory and Appraisals filed. Need final inventory and appraisal
4. Notice given.
5. ~Proposed order: 03/19/18

RECOMMENDATION:

If approved, set next Accounting/Status Review for 01/14/19. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(cs)

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

DATE: 04/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700556

CASE NAME: MTR OF JOHN JACOBBER

HEARING:

first and final Account and Report of RENE JACOBBER and Petition
for allowance of fees filed.

COUNSEL:

RENE JACOBBER (PET)...J PATRICK RAGAN
JOHN JACOBBER (DEC)...

GENERAL INFORMATION:

Continued from 03/05/18 counsel indicates there is no objection but requests additional time to clear probate notes.

THIS CASE IS SET FOR HEARING ON First and Final Account, final distribution and Petition for Fees by Rene Jacobber, executor/brother

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

- 1 Assets on hand: \$626,494.86 cash.
- 2 It appears assets have been distributed [LF,p. 15]. There does not appear to be any harm done to estate.
- 3 **Need** bank statement to support ending balance per Local Rule 20-908.
- 4 Supplement to first and final account filed 04/10/18. However total charges and total credits do not match. Accounting does not balance. **Need** corrected summary of account and include affected schedules.
- 5 Schedule G Distribution indicates distribution of \$200,000 of which Rene Jacobber assigned to Ann Fristom. Question distribution as Rene Fristom does not appear to be a beneficiary of the will? **Need** clarification via verified supplement.
- 6 Distribution does not include \$1,500 to Pat Springwell for funeral services. **Need** verified supplement.
- 7 Petitioner and Attorney request statutory fees of \$32,141.07 each. Calculated.
- 8 Petitioner requests reimbursement in the amount of \$14,675.14. It appears fees have been reimbursed. Itemization in "Schedule B Disbursement" [Supp. 04/10/18 LF,p.9/10] appears to have Fed-Ex, several postal service and what appears to be a

- duplicate entry for funeral expense in the amount of \$1,386.94. Total amount does not match amount requested in report. **Need** verified supplement.
- 9 Disbursement schedule does not match Summary of Account. **Need** corrected schedule.
 - 10 **Need** statement regarding notice to Franchise Tax Board or proof of service of the same Pr. C. § 9202(c)(1).
 - 11 Petitioner requests a reserve of \$62,000.00 for potential income taxes that may be due. **JTD**
 - 12 Notice given
 - 13 Proposed Order: 01/03/18; however, is missing statements re: creditor's claims, taxes/debts paid, notice per Pr.C. § 9202, assets on hand, request for reserve of \$2,000, and omnibus clause that was indicated in the petition.

RECOMMENDATION:

Need to clear notes 3-6 & 8-10 Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge for **07/01/19**.

(ww/cs)

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

DATE: 04/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700715

CASE NAME: DAVID ROLLER

HEARING: Petition for PROBATE OF WILL AND FOR LETTERS TESTAMENTARY
filed by ELAINE ELIZABETH KENDRICK

COUNSEL:

LISA DAVIS UNGER (PET)...MARK W REGUS
DAVID ROLLER (DEC)...
ELAINE ELIZABETH KENDRICK (PET)...OLDMAN COOLEY SALLUS BIRNBE

GENERAL INFORMATION

Continued from **09/25/17** as Mr. Oldman will be filing a new petition.

Continued from **11/20/17**.

Continued from **01/09/18**. Counsel states possible settlement.

Continued from 03/05/18. Counsel informs Court there is a fully signed settlement agreement and they are awaiting receipts. Matter is continued.

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by **Elaine Kendrick, daughter/executor**

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

1. Will dated 04/28/10 waives bond. The estate consists of **\$2,500.00** in personal property. The Court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(c). Court may wish to clarify estimated amount of estate property as there is a substantial difference in value indicated between competing and current petitions filed.
2. Dismissal of competing petition for Letters Testamentary filed 02/22/18 by Lisa Davis.
3. ~Proposed Form Order: 09/28/17

RECOMMENDATION

Court's discretion re bond and note 1. If approved, set Accounting/Status Review for **07/01/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/nb/ww/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701065

CASE NAME: ESTATE OF LINDA MARIE ROSALES

HEARING:

Hearing Re: Preliminary Injunction (Restraining Order)

COUNSEL:

MICHAEL A ROSALES (PET)...BERL HILLEL SELSKI
LINDA MARIE ROSALES (DEC)...

Waiver of Court Fees and Costs filed by MICHAEL A ROSALES is GRANTED

No notes- JTD.

Future Hearing: 4/01/19 Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800245

CASE NAME: MTR OF DAVID HUERTA BARCENAS

HEARING:

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

COUNSEL:

RAMONA BARTENAS CASTANEDA (PET)...PAUL HORN
DAVID HUERTA BARCENAS (DEC)...

X-REF PROPS1701090 (Est. of David Huerta Barcena by Jose Espinal)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by sister, Ramona Castaneda, appointing niece Monique Castaneda, [Administrator/Petitioner].

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

1. Petitioner requests bond of \$273,680. Estate value \$273,680 with \$23,680 in personal property.
2. **Objections and request to consolidate cases under lower number [see X-REF] filed 04/09/18. JTD**
3. Notice of Related cases filed.
4. ~Proposed Form Order: 03/14/18

RECOMMENDATION

Matter is contested. Suggest court trail to 04/30/18 to be heard with related matter.. If approved, set Accounting/Status Review for 07/01/19. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

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

DATE: 04/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800255

CASE NAME: MARTHA L MEZA

HEARING:

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

COUNSEL:

JOSE A MEZA	(PET)...MIRAU, EDWARDS, CANNON, LEWIN
LETICIA ESTRADA	(PET)...MIRAU, EDWARDS, CANNON, LEWIN
MARTHA L MEZA	(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by children, Jose Meza and Leticia Estrada, [Administrators/Petitioners]

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

1. **Notice of Petition Administer Estate filed 04/16/18; however, not in Laserfiche at time of review.**
2. All heirs waive bond. Net estate value of \$262,000.00 in real property. The court may for good cause require that a bond be given, either before or after issuance of letters. Prob. Code §8481(b).
3. Nominations signed by siblings.
4. Petitioner submitted an outdated form (2008). JTD
5. Notice to Petition to Administer Estate and proof of service filed 03/23/18, however, missing attorney name, address and telephone number. **Need** corrected notice.
6. **Need** Duties and Liabilities form.
7. No Proposed Form Order. Submit after hearing.

RECOMMENDATION

Need to clear notes 4-6, then Court's discretion re bond and note 4. If approved, set Accounting/Status Review for 07/01/19. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

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

DATE: 04/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800264

CASE NAME: ANGELINA REYES

HEARING:

Hearing re: Petition for Probate of Will and Letters with limited authority IAEA.

COUNSEL:

PAUL MICHAEL REYES (PET)...ASHLEY E TEAGUE
ANGELINA REYES (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with *Limited Authority* under IAEA by spouse, Paul Reyes, [executor/Petitioner]

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

1. Will waives bond. Net estate value \$0. 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. **Need** Notice to Petition to Administer Estate and proof of service.
3. **Need** proof of publication.
4. ~Proposed Form Order: 03/20/18

RECOMMENDATION

Need to clear notes 2-3, Court's discretion re note 1 and bond. If approved, set Accounting/Status Review for **07/01/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 8:30 DEPT: S36P

CASE#: SPR SS04872

CASE NAME: ESTATE OF LILLIAN E MICHIK

HEARING:

Accounting Review by ***

COUNSEL:

RICHARD MICHIK	(PET)...JEFFORD C DAVIS
LILLIAN E MICHIK	(DEC)...
ROBERT MICHIK	(TP)...SHORE & WURM

CASE TO REAMIN IN S36

GENERAL INFORMATION:

Continued many times since **10/3/11**.

Continued from 02/01/16 for Counsel to prepare and file a written Status Report and/or Accounting by the end of the month. Court is informed that the estate cannot be closed because counsel has been unable to sell the Salton Sea property which is the only asset remaining. Counsel for the petitioner has contacted the neighbors/adjacent owners to see if they would put the property up for auction or be willing to take the property.

Continued from 03/30/16, 06/09/16, 08/18/1,11/02/16 and 01/11/17 for a status report to be filed.

Nothing new filed since 12/6/11.

Continued from **3/22/17** at request of Counsel for sale of property to close.

Continued from **08/15/17 and 10/24/17** on court's motion for status of resolution. Counsel report there is a potential buyer.

Continued from 01/23/18 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting/Status Review.

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

1. Letters Testamentary issued 08/21/08 to Richard Michik, son, full authority no bond.
2. On 10/28/10, Court deemed the accounting filed on 12/31/07 as a status report.
3. Copy of subpoenaed request filed on 05/09/16. However, it is unclear how the Chief Trial Counsel in Los Angeles is involved. Court to inquire.

4. Status report filed by counsel in the form of a declaration on **12/14/16**. **No fees paid**. Petitioner alleges the property is minimal and no one wants to purchase the property.
5. Ex parte letter appears to be filed to the Judge on 10/21/16 by Richard Michik.
6. **Need** notice of hearing and proof of service per Pr. C. § 12201(b) advising the recipients of the right to petition for an account.

RECOMMENDATION:

Need notice and fees paid (note 4). If approved, set Accounting/Status Review for **04/04/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/sa/gls/lc/sa/lc/dl/sa/l/lhc/lh/nb/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 8:30 DEPT: S36P

CASE#: TRU PS1800025

CASE NAME: HINKLE FAMILY TRUST

HEARING:

Petition for TO DISTRIBUTE DECEDENT'S ASSETS TO TRUST

COUNSEL:

BETTY L POUND (PET)...THOMAS L MARSHALL
HINKLE FAMILY TRUST (TRU)...

Currently under review by Legal Research.
(LR)

Notice:

Notice given.

(ww/cs)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

CONSERVATORSHIPS

DATE: 04/23/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700205

CASE NAME: RICHARD LEE REYNOLDS

HEARING:

First and Final Account and Report of ROBERT B ROGERS and
Petition for allowance of fees filed.

COUNSEL:

ROBERT B ROGERS

(CPE)...LAYNE A BARTHOLOMEW

RICHARD LEE REYNOLDS

(CEP)...PRO/PER

E. JOAN NELMS

(PET)...JAMES B CHURCH & ASSOCIATES

X-REFPROPS1800174 (Estate of Richard Reynolds)

GENERAL INFORMATION:

Conservatee passed away on 08/30/17

THIS CASE IS SET FOR HEARING ON First and Final Account; Petition to terminate conservatorship and Distribute; and Petition for Fees by cousin, Robert Rogers, [Conservator /Petitioner].

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

- 1 Inventory and Appraisal is incomplete as to section 5 re tax certification.
- 2 Accounting period: 06/12/17–11/21/17 (pre and post death periods).
- 3 Assets on hand: \$283,475.47 of which \$35,475.47 is cash and remaining in real property.
- 4 Bond \$32,000. JTD
- 5 It appears family member and girlfriend resided in conservatee's residence while conservatee resided in a nursing home in Michigan during accounting period. Question if any rents were collected, if family member contributed toward utilities and/or maintenance the residence? **Need** verified supplement
- 6 It appears conservatee resided a nursing home. Question if payments made to nursing home. **If so, need** residential facility statements per Pr.C. § 2620(c)(5).
- 7 Petitioner requests fees in the amount of \$2,862.50 for 114.5 hours' at \$25/hour. [LF, pgs.83-85]. JTD

- 8 Petitioner incurred expenses in the amount of \$3,973.51 on behalf of the conservatorship of which \$1,203 has been reimbursed. [LF,p.87] JTD.
 - a. Reimbursement include fees for travel to Michigan, parking fees, meals, auto rental and gas to conduct business for conservatorship matter.
- 9 Attorney requests fees in the amount of \$10,577.50 . Billed at 19.8/hours' at \$350.00/hour; 26.3 hours' paralegal time at \$120/hour; plus costs of \$581.50 advanced, minus \$90 already paid. , [LF, pgs.72-78]. JTD
7. Petitioner requests the court terminate the conservatorship and order petitioner to distribute all assets to the estate of Richard Reynolds.
8. Notice given.
9. Proposed Order: does not include accounting period.

RECOMMENDATION:

Need to clear notes 4-5, then Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge for 04/29/19.

(cs)

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

DATE: 04/23/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700366

CASE NAME: LALITA JOY REDDY

HEARING:

Hearing Re: OSC re: Dismissal

COUNSEL:

CHRISTIAN MICHAEL REDDY (CP)...PRO/PER
LALITA JOY REDDY (CTP)...J DAVID HORSPOOL

GENERAL INFORMATION

Continued from **11/20/17**. Attorney Horspool appointed.

Continued from **01/02/18**. Counsel has not been able to make contact with his client.

Continued from 02/20/18 Counsel has not been able to make contact with his client. Court sets this matter for OSC re: dismissal FTA/failure to prosecute. Notice to be given by Attorney Horspool.

THIS CASE SET FOR HEARING ON **OSC Re Dismissal** of Petition for Appointment of Conservator person only, by Christian Reddy, [brother/Petitioner]

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

1. No bond- Person only.
2. Petitioner seeks dementia powers; however, need more information as proposed conservatee is 41 years old and no mention of dementia is made in the petition or supporting documents. **Need report by court-appointed counsel, J. David Horspool.**
3. Certificate of Completion of the Conservatorship Training Class dated 10/11/17 received.
4. Petitioner seeks medical powers. Capacity Declaration filed 10/17/17.
5. Attachments 3(f)(1) and 3(f)(2) reference relatives in India, mother of conservatee who is allegedly under conservatorship with the State being her conservator, and 5 children of the proposed conservatee. **Need** amended List of Required Contacts (Local form SB-12224) as all relatives in the 2nd degree must be noticed. [Pet. LF pgs. 10-11]
6. **Need** Due Diligence Declarations (local form) for all 2nd degree relatives that cannot be located.
7. **Need** Notice of Hearing and proof of service on all relatives in the 2nd degree.

8. **Proof of personal service filed. However, need return of Citation.**
9. CI report filed 11/14/17.
10. ~Proposed Form Order: 10/11/17

RECOMMENDATION

Need to clear notes 2, 5-8. If approved, set hearing for Compliance Review for **11/26/18** 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

(ww/nb/cs)

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

DATE: 04/23/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700455

CASE NAME: MATTER OF ANGELINA MARIE CASILLA

HEARING:
Petition for Appointment of Conservator

COUNSEL:

KATHLEEN YZAGUIRRE (CP)...PRO/PER
PERCY YZAGUIRRE (CP)...PRO/PER
ANGELINA MARIE CASILLAS (CTP)...KARIN HORSPOOL

GENERAL INFORMATION

Continued from 01/22/18 at request of counsel to clear probate notes. Attorney Karin Horspool is appointed for Angelina Casillas.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Kathleen and Percy Yzaguirre, grandmother and step-grandfather

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

1. **Note: Proposed conservatee will not be an adult until 04/12/18.**
2. No bond- person only
3. Petitioner indicates that medical powers are sought in section 9; however, section 1g as to 2355 medical powers is not marked. **JTD**. Capacity Declaration filed 12/13/17.
4. Petitioners request Pr. C. § 2351.5 authority to make education decisions; to fix the residence/dwelling; authority to access confidential records/documents/reports & other info regarding the proposed conservatee, including those in the possession of the Regional Center, authority to control the right of conservatee to consent to marriage/domestic partnership, right to control social and sexual contacts/relationships; right to contract, authority to make & consent to medical decisions for the conservatee.
5. Petitioner seeks civil rights not be limited without court order. **JTD**
6. Attachments to petition, proposed order and letters indicate requested estate powers; however, petition is for person only. Court to inquire.[Pet. LF pgs. 12-13]
7. **Certificates of Completion of the Conservatorship Training Class filed 04/16/18.**

8. Proposed conservatee is developmentally disabled. **Need** report of Karin Horspool appointment counsel.
9. Notice of Hearing and proof of service filed 01/18/18 to all relatives listed on List of Required Contact Information; however, no notice has been given to the other set of grandparents. **Need** notice to grandparents.
10. Petition and List of required contacts does not indicate the name of the other set of grandparents of proposed conservatee's. **Need** verified supplement indicating same.
11. Citation with proof of serviced filed 01/31/18.
12. IRC report filed 01/18/18.
13. CI report filed 01/16/18.
14. ~Proposed Form Order: 12/13/17

RECOMMENDATION

Need IRC report and to clear notes 8-10, then Court's discretion. If approved, set hearing for Compliance Review for **11/26/18** 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.

(ww/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800005

CASE NAME: CARL RENE RUFFIN

HEARING:

Petition for Appointment of Conservator of the Person Limited
Conservatorship

COUNSEL:

ROBBIE M TAYLOR	(PET)...PRO/PER
CARL RENE RUFFIN	(CTP)...ROSE C ROSADO
GLORIA HAYDEN	(CP)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by sibling, Gloria Hayden ["Petitioner"].

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

1. **IRC letter filed 04/10/18 requesting additional 30 day continuance.**
2. No bond – person only.
3. Proposed limited conservatee's civil and legal rights are not to be limited without a court order.
4. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access to and limit access to confidential records, control right to contracts, give or withhold medical consent, consent/withhold consent to marriage, and make decisions re-education. JTD
5. Petitioner requests waiver of investigation fee. JTD
6. Declaration by petitioner filed 03/14/18.
7. Petitioner indicates unable to access his proposed conservatee's medical records. **Need** Medical Capacity Declaration.
8. Notice to Inland Regional Center only allowed 26 days' notice. **Need** proper notice. JTD
9. Proposed conservatee is developmentally disabled. **Need** report by court-appointed counsel.
10. **Need** return of Citation.
11. **Need** Inland Regional Center Report.

12. **Need** CI Report.
13. **Need** Certificate of Completion re Conservatorship Class.
14. **Need** Notification of Court of Conservatorship Address (Local form SB-14522).
15. **Note:** Petition for limited conservatorship by Robbie Taylor filed. Matter set for 05/16/18. Suggest Court trail to 05/16/18.
16. ~Proposed Form Order/Letters 03/14/18.

RECOMMENDATION: Court to trail to 04/23/18.

Need to clear notes 7-14, Court's discretion re note 15. If approved, set hearing for Compliance Review for **11/26/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(cs)

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

DATE: 04/23/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800016

CASE NAME: RITA STULLER

HEARING:
Petition for Appointment of Conservator

COUNSEL:
KRISTEL MELDRUM (PET)...PRO/PER
RITA STULLER (CEE)...ROSE C ROSADO

GENERAL INFORMATION

**Continued from 03/05/18 at request of Court for petitioner to clear probate notes.
Attorney Rose C Rosado is appointed for Rita Stuller.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only
by daughter, Kristel Meldrum, [daughter/Petitioner].

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

- 1. Notice of Hearing and proof of service filed 04/04/18; however, not in Laserfiche at time of review.**
2. Petitioner requests that bond not be required but attachment 1c re: reasons why is missing. Court may wish to inquire, or in alternative, need verified supplement.
3. Petitioner indicates that proposed conservatee lacks capacity to give informed consent to treatment; however, medical powers are not being requested in section 1g. Court to inquire. **If** they are being requested, then need Capacity Declaration.
4. Confidential Screening form filed; however, signature is dated with future date of 01/22/19. **JTD.**
5. Petitioner seeks dementia powers. **Need** report of Rose Rosado court appointment of counsel.
6. Section 3f is marked; however, **need** attachments 3f(1) and 3f(2) as to proposed conservatee's relatives and proposed conservatee's preferences concerning appointment.
7. List of Required Contacts is filed; however, it does not match the petition. **Need** completed form to include all relatives within the 2nd degree.

8. Confidential Supplemental form in incomplete as to section 2, 4c1, and 5. **Need** completed form.
9. **Need** return of Citation.
10. **Need** Notice of Hearing and proof of service.
11. Certificate of Completion of the Conservatorship Training Class filed 02/13/18.
12. CI report filed 02/15/18.
13. No Form Order Provided.

RECOMMENDATION

Need to clear notes 5-10. Court's discretion re notes 2-4. If approved, set hearing for Compliance Review for **07/01/19** 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

(ww/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 1:30 DEPT: S36P

CASE#: CON PS1500086

CASE NAME: CARLOS ORENDAIN

SEE ALSO 23, 24, 25, 26

HEARING:

Court Trial set for PETITION FOR CONSERVATORSHIP of MARIA
ORENDAIN ISAIDO

COUNSEL:

MARIA ORENDAIN ISAIDO	(PCR)...PRO/PER
CARLOS ORENDAIN	(PCE)...MITCHELL I ROTH
CHRISTINA ERICKSON-TAUBE	(CE)...SHERRI L KASTILAHN
KENIA ORENDAYN ISALDO	(PET)...RICHARD M MOSS
ASCENCION ISALDO DIAZ	(TP)...PRO/PER
SAMUEL BRAMBILA	(PRO/PER)

Waiver of Court Fees and Costs filed by MARIA ORENDAIN ISAIDO is GRANTED

Waiver of Court Fees and Costs filed by CARLOS ORENDAIN is GRANTED

No notes – Trial. JTD

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 1:30 DEPT: S36P

CASE#: CON PS1500086

CASE NAME: CARLOS ORENDAIN

SEE ALSO 22, 24, 25, 26

HEARING: Re: Ptn for Conservatorship of the Person Only

COUNSEL:

MARIA ORENDAIN ISAIDO	(PCR)...PRO/PER
CARLOS ORENDAIN	(PCE)...MITCHELL I ROTH
CHRISTINA ERICKSON-TAUBE	(CE)...SHERRI L KASTILAHN
KENIA ORENDAYN ISALDO	(PET)...RICHARD M MOSS
ASCENCION ISALDO DIAZ	(TP)...PRO/PER
SAMUEL BRAMBILA	(PRO/PER)

GENERAL INFORMATION:

Continued from **6/23/15**. Court Investigator notified that there are competing petitions and requests report to address both petitions.

Continued from **8/6/15** at request of counsel. Notice to be given by Krishna Malhotra.

Continued from **9/29/15**.

On 10/2/15 **Christina Taube-Erikson appointed temporary conservator of estate** and successor GAL in Worker's Compensation Appeals Board action.

Continued from **1/25/16** Court notes that there are several competing petitions. All temporary orders to remain in full force and effect.

Continued from **6/7/16** at request of counsel.

Continued from 06/22/16. Court appoints Christina Erickson-Taube as temporary conservator of person; counsel to submit for signature revised/amended order and letters showing temporary conservator of person and estate.

Continued from **10/25/16** pending outcome of motion to be relieved.

Continued from **12/06/16 and 12/12/16**. Matter is continued for Kenia Orendayn Isaldo to file an accounting. Accounting to be filed by 01-27-17. Notice to be given by Attorney Mitchell Roth.

Continued from **02/27/17**. Court orders that Kenia Orendayn Isaldo file her accounting prior to the next hearing. If the accounting has not been filed court will strike her petition and surcharge her for the full amount of the monies received for caregiver services. All temporary orders to remain in full force and effect until 04/24/17.

Continued from **04/24/17**. Court finds: All future payments from medical compensation are to be given to Christina Erickson-Taube. Mitchell Roth prepared order regarding funds.

Kenia Orendayn Isaldo and counsel Richard Moss are ordered to appear at the next hearing. Accounting is to be filed no later than 5-19-17. No account filed.

Continued from **06/19/17 and 08/07/17 and 10/23/17** Maria Orendain withdraws per petition as to the estate. Petition for conservatorship by Kenia Orendayn Isaldo is withdrawn per agreement of counsel.

Continued from 12/04/17 01/29/18 and 03/13/18 matter to be set for trial calendar is set for 04/12/18. This hearing will trail the seam date

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship 022717.

- Petition 1 – for Conservatorship, person only, by **Maria Orendain Isaldo** (sister)
- Petition 2 – for Conservatorship, person and estate, by **Kenia Orendain** (sister)-**Withdrawn**
- Petition 2 – for Conservatorship, person and estate, by **Christina Erickson-Taube** (PPF)

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

Petitioner 1 – Maria Orendain Isaldo, sister

1. Matter transferred from Los Angeles County. Per LA minute order dated 12/04/14, it does not appear temporary or general orders were made.
2. Medical Capacity Declaration filed 10/6/15 supporting request.
3. Certificate of Completion re Conservatorship Class filed 07/08/16.
4. **Objections filed by competing petitioner Kenia on 06/19/15.**
5. **Petition filed by Kenia Orendayn Isaldo on 06/16/16; however, withdrawn per agreement of counsel on 10/23/17.**
6. Supplemental Report by Court-Appointed Counsel, Mitchell Roth, filed 05/09/17.
- 7.

Petitioner 2 – Christina Erickson-Taube, PPF/ temporary conservator of the person

8. Petitioner requests bond, but does not state an amount. Current bond of \$100,000 posted as to the Temporary Conservatorship. Estimated estate value is \$38,222. Based on estate value and cost of recover, Court may wish to require bond of \$43,000.
9. Medical powers sought. Capacity Declaration filed 10/6/15. Updated Capacity Declaration filed 09/29/16. Capacity Declaration filed 11/14/16.
10. Need return of Citation.
11. **Court Investigator report filed on 7/22/15 as to petitioners Maria and Kenia. CI report as to petitioner Christina Erickson-Taube filed 07/28/16.**
12. Consents to act filed 10/23/14 by mother, Ascencion Isaldo Diaz, and brother-in-law, Samuel Brambila; however, no petitions filed by them.
13. Report of LA court-appointed counsel filed 12/04/14. Report by Attorney Roth filed 8/6/15, 9/24/15 and 1/12/16. **Court to review supp. report by Attorney Roth filed 08/03/16.**
14. **Objections filed by Kenia Orendayn Isaldo on 06/16/16**

RECOMMENDATION:

Matter is contested. If approved, set hearing for Compliance Review for **11/26/18** 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 and Inventory & Appraisal with notice.

Set hearing re Accounting Review for **07/01/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(vet/lc/vet/abs/ds/nb/sa/nb/ww/nb/cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 04/23/18 TIME: 1:30 DEPT: S36P

CASE#: CON PS1500086

CASE NAME: CARLOS ORENDAIN

SEE ALSO 22, 23, 25, 26

HEARING:

Hearing Re: PTN FOR CONSERVATORSHIP OF THE PERSON AND ESTATE

COUNSEL:

MARIA ORENDAIN ISAIDO	(PCR)...PRO/PER
CARLOS ORENDAIN	(PCE)...MITCHELL I ROTH
CHRISTINA ERICKSON-TAUBE	(CE)...SHERRI L KASTILAHN
KENIA ORENDAYN ISALDO	(PET)...RICHARD M MOSS
ASCENCION ISALDO DIAZ	(TP)...PRO/PER
SAMUEL BRAMBILA	(PRO/PER)

See notes on matter 23.

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

DATE: 04/23/18 TIME: 1:30 DEPT: S36P

CASE#: CON PS1500086

CASE NAME: CARLOS ORENDAIN

SEE ALSO 22, 23, 24, 26

HEARING:

Hearing Re: Kenia Orendayn's Account and Report/Petition

COUNSEL:

MARIA ORENDAIN ISAIDO	(PCR)...PRO/PER
CARLOS ORENDAIN	(PCE)...MITCHELL I ROTH
CHRISTINA ERICKSON-TAUBE	(CE)...SHERRI L KASTILAHN
KENIA ORENDAYN ISALDO	(PET)...RICHARD M MOSS
ASCENCION ISALDO DIAZ	(TP)...PRO/PER
SAMUEL BRAMBILA	(PRO/PER)

Waiver of Court Fees and Costs filed by MARIA ORENDAIN ISAIDO is GRANTED

Waiver of Court Fees and Costs filed by CARLOS ORENDAIN is GRANTED

TOTAL FEES WAIVED TO DATE: \$1395.00

GENERAL INFORMATION:

Continued from **08/07/17**. Court orders proper accounting to be filed.

Continued from 10/23/17, 12/04/17, 01/29/18 and 03/13/18 matter to be set for trial.

THIS CASE IS SET FOR HEARING ON Accounting and Report of Proposed Conservator, Kenia Orendain ["Petitioner"-sister].

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

1. No inventory and appraisal. However, order or letters have not issued as to this petitioner.
2. Accounting period 12/28/12 to 12/24/15 (3 years).
3. Assets on Hand \$0.00.
4. No request for compensation or fees.
5. Petitioner requests reimbursement of costs advanced of \$43,508. **Need** itemization.
6. Summary of Account [LF, pg. 6] – Total Charges and Total Credits do not match. **Need** amended summary and affected schedules.
7. Attachment A – Receipts [LF, p19-20] reflects temporary and permanent disability payments. However, a total is not given.
8. Schedule C – Disbursements [LF, p18] does not include dates or check no's.

9. **Need** Notice of Hearing and proof of service.
10. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

This accounting does not appear to be a true and complete accounting and should be deemed in the nature of a status report. There is insufficient information and known defects that should preclude the Court from approving this accounting period.

(nb/ww/nb/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 1:30 DEPT: S36P

CASE#: CON PS1500086

CASE NAME: CARLOS ORENDAIN

SEE ALSO 22, 23, 24, 25

HEARING:

Hearing Re: TRIAL SETTING CONFERENCE ON SURCHARGE

COUNSEL:

MARIA ORENDAIN ISAIDO	(PCR)...PRO/PER
CARLOS ORENDAIN	(PCE)...MITCHELL I ROTH
CHRISTINA ERICKSON-TAUBE	(CE)...SHERRI L KASTILAHN
KENIA ORENDAYN ISALDO	(PET)...RICHARD M MOSS
ASCENCION ISALDO DIAZ	(TP)...PRO/PER
SAMUEL BRAMBILA	(PRO/PER)

Waiver of Court Fees and Costs filed by MARIA ORENDAIN ISAIDO is GRANTED

Waiver of Court Fees and Costs filed by CARLOS ORENDAIN is GRANTED

No notes – TSC. JTD
(cs)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 04/23/18 TIME: 8:30 DEPT: S37P

CASE#: PRO DS1000277

CASE NAME: MTR OF THE SPECIAL NEEDS TRUST OF LARRY FORD

HEARING:

Seventh Account and Report of INLAND COUNTIES REGIONAL CENTER
INC and Petition for allowance of fees filed.

COUNSEL:

INLAND COUNTIES REG CNTR

(PET)...STEVEN K BECKETT

SPECIAL NEEDS TRUST OF LARRY FORD

(TRU)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Seventh Account and Report of IRC and Petition for Approval of Trustee's Fees and for Attorney's Fees; and Request to Amend the Trust

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

1. Accounting covers period: 02/01/16-01/31/18
2. Assets on hand: \$834,356.34 of which \$184,356.34 is cash and the remainder in real property.
3. Current bond is \$182,000.00. Petitioner requests that bond be increased to \$203,000.00 Appears adequate. **JTD**
4. Report of beneficiary filed separately.
5. Petitioner requests approval of trustee fees already taken by Master Trust of California in the amount of \$7,024.98. Billed at \$1,250 for the first \$50,000; 2% of the next \$250,000; 1.65% of the next \$450,000, 1.50% of the next \$250,000 and 1.25% on the balance over \$1,000,000. Services generally itemized. **JTD** [LF pg. 29]
6. Petitioner requests authority to allow Master Trust to continue taking its annual fee according to its 2017 fee schedule in quarterly payments. **JTD**
7. Attorney requests fees of \$1,180.00 for 6.30 hours of paralegal and 2.20 hours of attorney services at \$100/250 per hour respectively. Itemization filed separately. **JTD**
8. Petitioner requests to amend the trust to add provisions regarding "Medicaid" language as a new Article Nine of the trust. **JTD**. [LF pgs. 31-57]
9. Notice is complete.

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.

10. ~Proposed Order:03/01/18

RECOMMENDATION

Court's discretion. If approved, set hearing on the next accounting review for **06/03/19** (if one year) or **06/01/20** (if two years). Accounting to be filed 30 days in advance.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1200918

CASE NAME: SARAH J. MCCLASKEY

HEARING:
Hearing re Final Discharge

COUNSEL:

LARRY PARKER (PET)...RICHARD I GONZALEZ
SARAH J MCCLASKEY (DEC)...

CCP170.6 filed as to Judge CYNTHIA LUDVIGSEN,

GENERAL INFORMATION:

Continued from **07/28/15** and **09/22/15** to determine where or whom the funds are to be distributed to as Counsel states there is a pending probate case in Ireland for an heir.

Continued from **12/01/15** to retain attorney service in Ireland to retrieve documents.

Continued from **02/09/16** Counsel still investigating re sister (heir) in Ireland.

Continued from **04/12/16, 6/13/16, 8/22/16 and 11/07/16.**

Continued from **06/27/17.** Amended order to be filed. Matter continued for Counsel to further verify son's and son's counsel's identity. Counsel has determined there is no Irish probate filed.

Continued from **08/22/17** on Court's motion to contact Irish Consulate. If proof of probate, bank account information and proper identification is not provided by a certain deadline, monies may be held. Notice to be given by Mr. Gonzalez.

Continued from **11/28/17** at request of counsel. Mr. Holohan, currently in Ireland, is attempting to assist Counsel in locating heir. Notice to be given by Mr. Gonzalez.

Continued from 02/13/18. Mr. Holohan is currently in Ireland attempting to locate heir. Mr. Holohan may file a fee declaration.

THIS CASE IS SET FOR HEARING ON Final Discharge of Administrator w/Will Annexed, Larry Parker, nephew/administrator w/will annexed.

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

1. First and Final Account approved on 07/29/14.
2. No receipts filed. **Need** same.
3. **Need** Ex-Parte Petition/Order for Final Discharge.

4. Declaration filed 02/03/16 alleges Lillian Thompson may be deceased and requests additional time to further investigate when/if Ms. Thompson died.
5. Notice of Hearing filed 11/04/16 does not give 15 days' notice. **Need** proper service.
6. Notice filed 11/04/16 affixes a declaration by Attorney Richard L. Gonzalez regarding final distribution, which indicates that an amended order is forthcoming. **Need** amended Order.
7. **Need** verified supplement identifying son and son's counsel.

RECOMMENDATION:

Need to clear notes. When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with Pr.C. § 8505.

(nb/dl/sa/lc/nb/lh/nb/ww)

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

DATE: 04/23/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500047

CASE NAME: Peter Fredric Williams

HEARING:

Probate status report filed.

COUNSEL:

SUSAN WILLIAMS (PET)...DINA I FARHAT, ESQ
PETER FREDRIC WILLIAMS (DEC)...

GENERAL INFORMATION:

Continued from **05/15/17** at request of counsel.

Continued from 07/24/17 and 10/16/17.

THIS CASE IS SET FOR HEARING ON Status Report by Personal Representative, Susan Williams.

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

1. Petitioner alleges the estate is not in a condition to be closed as the First and Final Account needs to be completed.
2. Petitioner requests an additional 3 months to close the estate.
3. **Need** Notice of Hearing and proof of service in accord with Pr.C. § 12201. Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. § 10950. **This form of notice is mandatory.**
4. No proposed order.

RECOMMENDATION:

Require notice then Court's discretion. If approved, set next Accounting Review for **07/23/18**.

(nb/lh/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600319

CASE NAME: ESATE OF GILDA JOAN DONCHE

HEARING:

Probate status report filed.

COUNSEL:

BRUCE BRAZEAU (PET)...ROBERT G PETROVICH

GILDA JOAN DONCHE (DEC)...

VICTIM COMPENSATION AND GOVERNMENT CLAIMS (TP)...

THIS CASE IS SET FOR HEARING ON Status Report.

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

1. Letters of Administration issued to Bruce Brazeau, brother, on 05/27/16; limited authority, \$493,000.00 bond.
2. Petitioner requests an additional 6 months to close the estate.
3. Estate is not in a condition to close due to the need to sell the Coca-Cola stocks and 2 remaining parcels of real property as both primary heirs are incarcerated. Only cash is allowed to be placed into their accounts.
4. Notice of Hearing and proof of service filed 03/19/18 and 03/23/18; however, **need** corrected Notice in accord with Pr.C. § 12201(b) advising the recipients of the right to petition for an account in accord with Pr.C. § 10950. This form of notice is mandatory.
5. Proposed Order: 03/08/18

RECOMMENDATION:

Need to clear note 4, If approved, set next hearing for Accounting Review for **10/01/18**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(ww)

Future Hearing: 4/25/18 Petition for Order to Vacate Order Confirming Sale of Estate Real Property
& to Order Resale

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

DATE: 04/23/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600539
CASE NAME: THURMAN DODD SR

HEARING: first Account and Report of ELIZABETH SNEED and Petition for allowance of fees filed.

COUNSEL:

ELIZABETH SNEED	(PET)...ZACHARY R HAGENBUCH
THURMAN DODD SR	(DEC)...
VICTORIA MARIE DODD	(PET)...PRO/PER
ELIZABETH SNEED	(PET)...CRAIG W WILSON

Waiver of Court Fees and Costs filed by VICTORIA MARIE DODD is GRANTED

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Current Account by Elizabeth Sneed, daughter/administrator

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

- 10 Accounting period: 11/14/16-01/09/18
- 11 Assets on hand: \$10,639.37 in cash.
- 12 Petitioner waives statutory commissions.
- 13 Petitioner requests reimbursement for advanced costs in the amount of \$1,594.50; however, the amount of \$13.50 for "Parking at the Courthouse" should be disallowed as the Court does not charge a parking fee. Generally described. [LF.pg. 6] **JTD**
- 14 Petitioner requests for an additional 6 months to close the estate as the claim period doesn't expire until 06/12/18. **JTD**
- 15 Attorney requests to right to reserve future payments of attorney's fees and costs. [LF. pg. 6] **JTD**
- 16 Notice is complete.
- 17 No proposed order.

RECOMMENDATION:

Court's discretion. If approved, Court to set next Accounting Review on **09/10/18**

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 04/23/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701049

VACATED

CASE NAME: RICHARD KELLY

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

BRUCE H GAYNOR

RICHARD KELLY

(PET)...TRENTON M DIEHL

(DEC)...

Bond filed 03/28/18.

(ww)

Future Hearing: 4/23/19 Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701058

CASE NAME: MTR OF THE LYDIA R GARCIA TRUST

HEARING:

Probate status report filed.

COUNSEL:

CARLOS GARCIA (PET)...EDWARD B FISCHER & ASSOCIATES
THE LYDIA R GARCIA TRUST AND ESTATE (TRU)...
CHRISTINE SHILES (OBJ)...PHILLIP MYER APC

THIS CASE IS SET FOR HEARING ON Status Report by Christine Shiles, objector.

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

1. Petitioner requests an additional 6 weeks to file accounting of all mother's accounts from 3 days prior to death to 11/30/17 per minutes of 12/14/17.
2. Petitioner indicates that she has been unwell and currently doesn't have the funds to purchase the statements from the bank.
3. **Need** verification signed by the personal representative per Pr.C. § 1021.
4. Notice given.
5. No proposed order.

RECOMMENDATION:

Need to clear note 3. If approved, set next hearing for **06/11/18**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(ww)

Future hearing dates:

05/24/18 Petition for Verified Trust Contest & Pour Over Will Contest of Carlos Garcia Etc

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800029

VACATED

CASE NAME: MTR OF LOIS ELLEN CARRINGTON

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

PATRICIA DES LAURIERS	(PET)...BUXBAUM & CHAKMAK
DAVID CURTIS	(PET)...BUXBAUM & CHAKMAK
LOIS ELLEN CARRINGTON	(DEC)...

Bond filed 03/26/18 and Letters issued.

(ww)

Future Hearing: 4/23/19 Accounting Review

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

DATE: 04/23/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800067

CASE NAME: Hoang Quoc Nguyen

HEARING:

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

COUNSEL:

DAVID QUOC NGUYEN (PET)...PRO/PER
HOANG QUOC NGUYEN (DEC)...

GENERAL INFORMATION:

**Continued from 02/20/18. Waivers of bond filed in the courtroom.
David Quoc Nguyen appointed as special administrator with limited IAEA on
03/15/18, no bond.**

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by brother, David Q. Nguyen ["Petitioner"].

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

1. All heirs waive bond. Net value of the estate consists of \$54,500.00 in real property. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD.**
2. Section 3c is incomplete as to decedent's residence at time of death. **Need** verified supplement.
3. Notice of Petition to Administer Estate filed 03/02/18; however 6b as to the court address is incomplete. **Need** corrected notice.
4. ~Proposed Form Order/Letters 01/17/18.

RECOMMENDATION:

Need to clear note 3 then Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **07/01/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/ww)

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

DATE: 04/23/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800069

CASE NAME: Richard A Mumford

SEE ALSO 11

HEARING:

OSC re: Dismissal

COUNSEL:

JAIME LYNN STRAHAN (PET)...PRO/PER
RICHARD A MUMFORD (DEC)...

GENERAL INFORMATION:

Continued from 02/20/18. No appearance.

THIS CASE IS SET FOR HEARING ON **OSC re: Dismissal of** Petition for Letters of Administration with full authority under IAEA by daughter, Jaime L. Strahan ["Petitioner"].

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

1. Court set OSC as there was no appearance by petitioner at hearing on 02/20/18,
2. Net value of the estate consists of \$159,737.78 of which \$67,408.70 is personal property.
 - a. Petitioner requests no bond be fixed and attaches waivers of bond by both heirs. However, petitioner is a non-resident and court has discretion to require bond per Pr. C. §8571. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
JTD.
3. **Need** proof of publication.
4. **Need** Notice of Petition to Administer Estate with proof of service.
5. No Form Order Provided.

RECOMMENDATION:

Need to clear notes 3 & 4 then Court's discretion re bond and OSC. If approved, set future hearing or Accounting/Status Review on **07/01/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800069

CASE NAME: Richard A Mumford

SEE ALSO 10

HEARING:

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

COUNSEL:

JAIME LYNN STRAHAN (PET)...PRO/PER
RICHARD A MUMFORD (DEC)...

See notes on matter 10.

(ww)

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

DATE: 04/23/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800267

CASE NAME: BONNIE JO ESTUS

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

COUNSEL:

MICHAEL ESTUS (PET)...ROBERT A KRASNEY
BONNIE JO ESTUS (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Michael Estus, son/executor/trustee

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

1. Will waives bond. The estate consists of \$170,000.00 in real property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. The will conditionally incorporates decedent's Trust. Copy of trust is attached.
3. Notice of Hearing and proof of service as to Zandra Smith, Sharon Estus and Steven Estus filed 03/22/18; however, notice is the wrong type and the petition title is of a petition that is not filed within the case. **Need** Notice to Petition to Administer estate to Zandra Smith, Sharon Estus and Steven Estus.
4. **Need** proof of publication.
5. ~Proposed Form Order: 03/20/18

RECOMMENDATION

Need to clear note 4 then Court's discretion re bond. If approved, set Accounting/Status Review for **07/01/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIP

DATE: 04/23/18 TIME: 8:30 DEPT: S37P

CASE#: CON PS1800077

CASE NAME: CRISTIAN PEREZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ESTELA PEREZ

(PET)...PRO/PER

CRISTIAN PEREZ

(CEE)...ROSE C ROSADO

GENERAL INFORMATION

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

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

1. No bond- person only
2. Petitioner seeks medical powers. Capacity Declaration filed 03/16/18.
3. Proposed conservatee is developmentally disabled. Rose Rosado appointed as counsel. Report of Counsel Rosado filed 04/16/18.
4. Proposed conservatee is developmentally disabled. **Need** IRC report.
5. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social/ vocational opportunities, authority to fix the residence/dwelling; authority to access confidential records/documents/reports & other info regarding the proposed conservatee, including those in the possession of the Regional Center, authority to control the right of conservatee to contract, authority to make & consent to medical decisions for the conservatee.
6. Petitioner seeks civil rights not be limited without court order. **JTD**
7. **Need** Certificate(s) of Completion of the Conservatorship Training Class.
8. CI report filed 04/10/18.
9. Citation with proof of service filed 04/05/18.
10. Notice is complete.
11. ~Proposed Form Order: 03/12/18

RECOMMENDATION

Need IRC report and to clear note 7. If approved, set hearing for Compliance Review for **11/26/18** 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.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

TRUSTS

DATE: 04/23/18 TIME: 8:30 DEPT: S37P

CASE#: TRU PS1800058

CASE NAME: MICHAEL MASON BALE LIVING TRUST

HEARING:

Petition for To Transfer Property into Living Trust

COUNSEL:

PAMELA JEAN EMANS

THE MICHAEL MASON BALE LIVING TRUST

(PET)...MARK J TUNDIS

(TRU)...

Currently under review by Legal Research

LR

NOTICE:

Notice of hearing to Kimberly Cianciolo, John Michael Bale, and Michael Bale filed 03/27/18; however, it appears that Michael Bale should be Michael Smith and notice was not was not provided to Kathee Rose Ross, named trust beneficiary.

Amended Notice of hearing to Kimberly Cianciolo, Michael Anthony Smith, and John Michael Bale filed 04/03/18; however, need 30 days' notice and **need** notice to include Kathee Rose Ross named trust beneficiary.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 04/23/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1701149

CASE NAME: HINOJOSA FAMILY TRUST

HEARING:

Hearing Re: PTN FOR SUSP OF POWERS OF CO-TRUSTEE AND REMOVAL

COUNSEL:

CELIA ANNE KIDSTON	(PET)...HARTNELL LAW GROUP
THE HINOJOSAFAMILY TRUST	(TRU)...PRO/PER
MARY ANNE STEPHENS	(PET)...BOB MULLEN

Currently under review by Legal Research

LR

Notice

Need notice to Anthony Hinojosa.

Notice waived by Mary Anne Stephens and Celia Anne Kidston at ex parte hearing on 02/13/18.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 8:35 DEPT: S37P

CASE#: TRU PS1800048

CASE NAME: THE RAMON G CRUZ LIVING TRUST

HEARING:

Petition for successor trustee, to establish trust's claim of ownership of real property

COUNSEL:

MARY L FUERTE (PET)...C. TRACY KAYSER
THE RAMON G CRUZ LIVING TRUST (TRU)...

Currently under review by Legal Research

LR

NOTICE:

Need Notice of hearing to Mary Fuerte; Sandra Cruz; Bill Flores; Yvette Fuerte; Frank Fuerte; Kathy Mariscal; Cynthia Mariscal; Marty Flores; Joshua Mariscal; and Amy Diaz aka Amy Mariscal. Notice must contain full description of the subject property ; a description of relief and from whom it is against if Pr.C. § 859 is being pursued; and a statement advising persons whom have interest in said property that they may file a response to the petition.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 04/23/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS0700237

CASE NAME: HERMINIA LOPEZ

HEARING:

Accounting Review by ***

COUNSEL:

CELIA B ALVAREZ (CPE)...PRO/PER

HERMINIA LOPEZ (CEP)...

WESTERN PROGRESSIVE LLC (PET/TEE)...THE LAW OFFICES OF LES ZIEVE

Ex parte petition to dispense with accounting and order approved and sent to S37 for signature. Next accounting review date to be set on **04/27/20**.

(ww)

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

DATE: 04/23/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700207

CASE NAME: MTR OF MADISON LEANN TIBKE

HEARING:
Petition for Appointment of Conservator

COUNSEL:

DENISE TIBKE (CP)...PRO/PER
MADISON LEANN TIBKE (CTP)...WALTER T. MOORE

GENERAL INFORMATION

Continued from **08/01/17**. Attorney Walter Moore appointed for Madison Leann Tibke.

Continued from **09/26/17**. No appearances. Notice by Judicial Assistant.

Continued from **11/21/17** on courts motion for petitioner to be present. Notice by Judicial Assistant.

Continued from 02/13/18. Notices filed in the courtroom. The Court notes paternal grandfather is deceased and paternal grandmother has dementia. The Court finds all notice requirements are complete. Petitioner to file a declaration regarding paternal grandmother's dementia. Counsel will submit an ex parte declaration to the Court ordering the doctor or his/her designee to complete the capacity declaration.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Denise Tibke (mother)

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

1. Proposed conservatee is developmentally disabled. **Need** report of Counsel Walter Moore.
2. Petitioner seeks orders related to powers under Pr. C. §2351.5 to fix residence, access confidential records, control right to contract, make and consent to all medical decisions.
3. Proposed conservatee is developmentally disabled. IRC report filed 09/21/17.
4. Petitioner seeks civil rights not be limited without court order. **JTD**
5. Petitioner seeks medical powers. **Need** Capacity Declaration.
6. List of Required Contact Information form is missing paternal grandparents. **Need** completed form.
7. **Need** Certificate of Completion of the Conservatorship Training Class.

8. **Need** return of Citation.
9. Court Investigator report filed 07/25/17.
10. ~Proposed Form Order: 06/05/17

RECOMMENDATION

Need Report of Counsel and to clear notes 5-8. If approved, set hearing for Compliance Review for **11/26/18** 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/nb/lh/nb/ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 04/23/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700380

VACATED

CASE NAME: GARY HOUGHTON

HEARING:

Accounting Review by ***

COUNSEL:

THOMAS N JACOBSON

(CE)...THOMAS N. JACOBSON

GARY HOUGHTON

(CTE)...PRO/PER

(ww)

Future hearing dates: 05/29/18 First and Final account and report of Thomas Jacobson and petition for allowance of fees.

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

DATE: 04/23/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800039

CASE NAME: MTR OF OLGA G HERRERA

HEARING: Petition for Appointment of Conservator

COUNSEL:

MARTHA UNG (CPE)...LAW OFFICE OF MARY M. BADER
OLGA G HERRERA (CEP)...SANDY L. TURNER

GENERAL INFORMATION:

Martha Ung appointed as temporary conservator of the person and estate on 02/13/18.

Continued from 03/19/18. Return of citation waived by Olga Herrera's appearance in court today. Counsel's report and capacity declaration to be filed. Attorney SANDY L. TURNER is appointed for OLGA G HERRERA. Next hearing set 04/23/18.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, of the person and estate by Martha Ung, daughter

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

1. Petitioner does not indicate bond amount. It appears estate consists of public benefits. Suggest minimum bond of \$20,000. **JTD**
2. Petitioner seeks dementia powers. Report of Counsel Sandy Turner filed 04/09/18.
3. Petitioner seeks medical powers. Capacity Declaration filed 02/26/18; however, is incomplete as to date physician saw proposed conservatee in item #4a. **Need** completed form.
4. Certificate of Completion of the Conservatorship Training Class filed 03/01/18.
5. Petitioner seeks powers to obtain a copy of the American National Insurance Life Policy issued to proposed conservatee, make elections and work with Medi-Cal and other California and federal agencies re the conservatee's eligibility for government benefits.
6. Notice given.
7. CI report filed 03/15/18.
8. ~Proposed Form Order: 02/07/18

RECOMMENDATION:

Need to clear note 3 then Court's discretion re Bond. If approved, set hearing for Compliance Review for **11/26/18** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of

Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Care Plan per Pr.C.§2352.5; Inventory and Appraisal, and Proof of service of I & A Instructions for Objection per Pr.C. §2610; and recordation of letters, if applicable, per Pr.C. § 2313.

Set hearing re Accounting Review for **07/01/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(cs/ww)

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

DATE: 04/23/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800078
CASE NAME: MTR OF DOUGLAS OVIDO MARTINEZ
HEARING: Petition for Appointment of Conservator

COUNSEL:

IRIAN A MARTINEZ (CP)...PRO/PER
DOUGLAS OVIDO MARTINEZ (CTP)...

GENERAL INFORMATION

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

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

1. No bond- person only
2. Petitioner seeks medical powers. Capacity Declaration filed 03/14/18.
3. Proposed conservatee is developmentally disabled. Lenita Skoretz appointed. **Need** report of counsel.
4. Proposed conservatee is developmentally disabled. **Need** IRC report.
5. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social/ vocational opportunities, authority to fix the residence/dwelling; authority to access confidential records/documents/reports & other info regarding the proposed conservatee, including those in the possession of the Regional Center, authority to control the right of conservatee to contract, authority to make & consent to medical decisions for the conservatee.
6. Petitioner seeks civil rights not be limited without court order. **JTD**
7. Citation and proof of service filed 03/26/18.
8. Due Diligence Declarations filed 03/26/18 as to Virginia Martinez (paternal grandmother), Evelin Martinez (sister), and Juan Martinez (father). **JTD**
9. **Need** Certificate of Completion of the Conservatorship Training Class.
10. **Need** CI report.
11. ~Proposed Form Order: 03/14/18

RECOMMENDATION

Need Report of counsel, IRC report, CI report and to clear note 9. If approved, set hearing for Compliance Review for **11/26/18** 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. (ww)

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

DATE: 04/23/18 TIME: 9:30 DEPT: S37P

CASE#: OC RS567

CASE NAME: IN THE MTTR OF CATHERINE D HAAR

HEARING:

Accounting Review by ***

COUNSEL:

DANIEL HAAR	(PET)...PRO/PER
JOANN HAAR	(PET)...PRO/PER
CATHERINE DENISE HAAR	(CEE)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Ex parte petition to dispense with 14th accounting and order by Daniel and Joann Haar, parents/limited co-conservators of the person and estate, approved on 04/22/16.
2. **Need** 15th accounting or waiver of account beginning with date of 03/22/16.

RECOMMENDATION

Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino
Page: 22A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 04/23/18 TIME: 9:30 DEPT: S37P

CASE#: EAP PS1800037

CASE NAME: RODRIGUEZ V RENDON

SEE ALSO 22B

HEARING:

Hearing Re: Elder Abuse Restraining Order

COUNSEL:

ESTHER A RODRIGUEZ (PP)...PRO/PER

LATISHA RENDON (RP)...

Notice to Latisha Rendon, respondent, filed on 04/05/18.

Response by Latisha Rendon, respondent, filed 04/05/18 and proof of service filed 04/04/18 and a duplicate filed 04/05/18

Court to see Declaration by Esther Rodriguez filed 04/12/18.

(ww)

Superior Court of Calif, County of San Bernardino
Page: 22B add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 04/23/18 TIME: 9:30 DEPT: S37P

CASE#: EAP PS1800037

CASE NAME: RODRIGUEZ V RENDON

SEE ALSO 22A

HEARING:

Hearing Re: Request to Modify Elder or Dependent Adult etc

COUNSEL:

ESTHER A RODRIGUEZ (PP)...PRO/PER

LATISHA RENDON (RP)...

Proof of service of Request to modify as to Esther Rodriguez filed 04/09/18.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/23/18 TIME: 10:00 DEPT: S37P

CASE#: PRO PS1700017

CASE NAME: ERNEST ALLEN BECKSTROM

SEE ALSO 24, 25, 26

HEARING:

Hearing Re: ACCEPTANCE OF APPOINTMENT BY PUBLIC ADMINISTRATOR

COUNSEL:

JAMES F BAKER	(PET)...BANKS GARCIA & JANIS
ERNEST ALLEN BECKSTROM	(DEC)...
KURT BECKSTROM	(PET)...ROBERT J SPITZ

X-REF: MWV 17007117; FWV 1402081

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Acceptance of Appointment by Public Administrator

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

- 1 Court set matter on 02/13/18 when Court indicated that the Public Administrator is to be appointed as special administrator to handle the sale of real property.
- 2 **Need** special order and letters submitted by Public Administrator.

RECOMMENDATION

Court's discretion.

(ww)

Future Hearings:

4/24/18 Petition for Letters of Admin w/ Limited IAEA

4/24/18 Motion to Compel Further Responses to Special Interrogatories etc

4/24/18 Motion to Compel Further Responses to Form Interrogatories, Set One, etc

4/24/18 Motion to Compel Further Responses for Production of Documents etc

4/24/18 Motion to Compel Further Responses to Request for Production of Documents etc

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

DATE: 04/23/18 TIME: 10:00 DEPT: S37P

CASE#: PRO PS1700017

CASE NAME: ERNEST ALLEN BECKSTROM

SEE ALSO 23, 25, 26

HEARING:

Petition for LETTERS TESTAMENTARY W/ FULL IAEA

COUNSEL:

JAMES F BAKER	(PET)...BANKS GARCIA & JANIS
ERNEST ALLEN BECKSTROM	(DEC)...
KURT BECKSTROM	(PET)...ROBERT J SPITZ

X-REF: MWV 17007117; FWV 1402081

GENERAL INFORMATION:

Continued from **03/20/17 and 05/24/17**. Court will require bond of \$602,140 for Mr. Baker and \$75,000 as to Mr. Beckstrom. Parties to meet and confer re rental properties.

Continued from **07/26/17** Court recommends hiring a property manager. Counsel stipulate to property manager Samson Debebe, to be manager of the properties subject to James Baker residing in the home. Discovery to be conducted.

Continued from **09/21/17**. By agreement the Court will appoint Samson Debebe as special administrator to handle the properties. Matter continued for Mr. Debebe to be contacted and asked if he wants to accept the appointment. If he does not want to act as Special Administrator, Court requests Counsel attempt to find another person who would be willing to act in that capacity. The Court orders Mr. Baker provide mortgage statements and proof of payments made to counsel.

Continued from **10/03/17 and 12/05/17** at request of counsel to trail other hearings set. Notice waived.

Continued from 02/13/18. Public Administrator to be appointed as Special Administrator. Matter continued for Public Administrator to accept appointment as Special Administrator to handle the sale of real property. Clerk's Office to notify Public Administrator. The Court grants Mr. Debebe authority as agent to conduct sale/sign sale documents. Proof of service of objections by James Baker to be filed.

THIS CASE IS SET FOR HEARING ON

- Petition 1 - Petition for Letters Testamentary with **full** authority under IAEA by named executor, **James F. Baker, friend**.

- Petition 2 - Petition for Letters of Administration with **limited** authority under IAEA by **Kurt Beckstrom, brother/caretaker**.

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

Petitioner 1 – James Baker, friend.

- 1 Sole beneficiary waives bond. Need bond of \$602,140.
- 2 Proofs of Subscribing Witness filed.
- 3 **Objections by Kurt Beckstrom filed 03/03/17.**
- 4 **Reply to Opposition filed by Kurt Beckstrom on 09/18/17.**
- 5 **Will Contest and Grounds of Opposition of Purported Will filed by Kurt Beckstrom on 09/21/17. Return of served Summons filed 02/14/18.**
- 6 ~Proposed Form Order 01/10/17.

Petitioner 2 – Kurt Beckstrom, brother/caretaker.

- 7 Petitioner alleges he is sole heir and waives bond. Personal property valued at \$27,400; real property net \$520,000. As petitioner is seeking limited authority, court may wish to require bond of \$27,400. JTD
- 8 **Objections by James F. Baker filed 09/08/17. Need proof of service.**
- 9 **Declaration by Attorney Spitz filed 09/18/17.**
- 10 **Declaration of Real Estate Broker, Samson Debebe, filed 09/18/17. Supplemental filed 09/21/17.**
- 11 ~Proposed Form Order: 03/03/17.

RECOMMENDATION:

Matter is contested. Need to clear note 8 then Court's discretion. If approved, set future hearing for Accounting/Status Review on **07/01/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

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

Future Hearings:

- 4/24/18 Petition for Letters of Admin w/ Limited IAEA
- 4/24/18 Motion to Compel Further Responses to Special Interrogatories etc
- 4/24/18 Motion to Compel Further Responses to Form Interrogatories, Set One, etc
- 4/24/18 Motion to Compel Further Responses for Production of Documents etc
- 4/24/18 Motion to Compel Further Responses to Request for Production of Documents etc

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 04/23/18 TIME: 10:00 DEPT: S37P

CASE#: PRO PS1700017

CASE NAME: ERNEST ALLEN BECKSTROM

SEE ALSO 23, 24, 26

HEARING:

Petition for LETTERS OF ADMINISTRATION W/LIMITED IAEA

COUNSEL:

JAMES F BAKER

ERNEST ALLEN BECKSTROM

KURT BECKSTROM

(PET)...BANKS GARCIA & JANIS

(DEC)...

(PET)...ROBERT J SPITZ

See notes on matter 24.

(ww)

Future Hearings:

4/24/18 Petition for Letters of Admin w/ Limited IAEA

4/24/18 Motion to Compel Further Responses to Special Interrogatories etc

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

DATE: 04/23/18 TIME: 10:00 DEPT: S37P

CASE#: PRO PS1700017

CASE NAME: ERNEST ALLEN BECKSTROM

SEE ALSO 23, 24, 25

HEARING:

Trial Setting Conference

COUNSEL:

JAMES F BAKER

ERNEST ALLEN BECKSTROM

KURT BECKSTROM

(PET)...BANKS GARCIA & JANIS

(DEC)...

(PET)...ROBERT J SPITZ

Trial Setting Conference- No notes- JTD

(ww)

Future Hearings:

4/24/18 Petition for Letters of Admin w/ Limited IAEA

4/24/18 Motion to Compel Further Responses to Special Interrogatories etc

4/24/18 Motion to Compel Further Responses to Form Interrogatories, Set One, etc

4/24/18 Motion to Compel Further Responses for Production of Documents etc

4/24/18 Motion to Compel Further Responses to Request for Production of Documents etc